The Sri Lankan Defense Industry: Market Opportunities and Entry Strategies, Analyses and Forecasts to 2016

Description: Product Synopsis
This report is the result of SDI/ICD Research's extensive market and company research covering the Sri Lankan defense industry. It provides detailed analysis of both historic and forecast defense industry values including key growth stimulators, analysis of the leading companies in the industry, and key news

Introduction and Landscape
Why was the report written?
The Sri Lankan Defense Industry Market Opportunities and Entry Strategies, Analyses and Forecasts to 2016 offers the reader insights into the market opportunities and entry strategies adopted by foreign original equipment manufacturers (OEMs) to gain market share in the Sri Lankan defense industry.

What is the current market landscape and what is changing?
The Sri Lankan defense market, which registered significant growth during the review period, is anticipated to remain steady at US$1.41 billion during the forecast period. The country's defense expenditure will continue to be driven by security threats, a strained relationship with India and a persistent threat from separatists. Defense expenditure as a percentage of GDP is also projected to decline as a result of the country's economy increasing at a faster rate than defense expenditure.

What are the key drivers behind recent market changes?
Sri Lanka is expected to invest US$7.07 billion of its defense expenditure in the fulfillment of its defense requirements. Factors such as post-war rehabilitation, a tense relationship with India and the persistent threat from separatists are expected to stimulate defense expenditure during the forecast period.

What makes this report unique and essential to read?
The Sri Lankan Defense Industry Market Opportunities and Entry Strategies, Analyses and Forecasts to 2016 provides detailed analysis of the current industry size and growth expectations from 2011 to 2016, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides a detailed understanding of emerging opportunities in specific areas.

Key Features and Benefits
The report provides detailed analysis of the current industry size and growth expectations from 2011 to 2016, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides a detailed understanding of emerging opportunities in specific areas.

The report includes trend analysis of imports and exports, together with its implications and impact on the Sri Lankan defense industry.

The report covers five forces analysis to identify various power centers in the industry and how these are expected to develop in the future.

The report allows readers to identify possible ways to enter the market, together with detailed descriptions of how existing companies have entered the market, including key contracts, alliances and strategic initiatives.

The report helps the reader to understand the competitive landscape of the defense industry in Sri Lanka. It provides an overview of key defense companies, both domestic and foreign, together with insights such as key alliances, strategic initiatives and a brief financial analysis.

Key Market Issues
Sri Lanka is expected to invest US$7.07 billion in its armed forces, of which US$0.33 billion is forecast to be on the acquisition of military hardware, offering foreign OEMs limited opportunities to cater to the Sri Lankan defense industry. Furthermore, during the civil war the country procured weapons by taking loans, and therefore over the next five years a portion of military expenditure will be spent on the repayment of existing loans.
Incidents of malpractice within the country's military industrial base may limit the growth of the country's defense sector. In addition to damaging the country's image in the global arms market, it also discourages foreign OEMs from market entry.

As a result of a lack of domestic defense capabilities, Sri Lanka is dependent on foreign suppliers to meet its military requirements. Arms imports, which registered an increase during 2008, are further decreased due to a portion of the nation's capital expenditure being used to repay the loans taken out by the government during the civil war.

Key Highlights
Sri Lankan defense expenditure grew at a CAGR of 10.12% during the review period and is estimated at US$1.42 billion in 2012. During the forecast period, the country's defense expenditure is expected to be driven by factors such as post war rehabilitation, a tense relationship with India and a persistent threat from separatists. However, military expenditure is expected to record a decrease in growth of -0.10% CAGR and remain at US$1.41 billion by 2016.

Suppliers willing to enter the Sri Lankan defense market do so by establishing offices within the country, forming a joint venture with a domestic defense firm or through the direct supply of defense equipment to the country. Of the three routes, entering the market through direct sales is the most preferred choice, and has been employed by countries such as India, Russia and Israel.

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