The Romanian 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 Romanian 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 Romanian 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) in order to gain market share in the Romanian defense industry.

What is the current market landscape and what is changing?
The Romanian defense market, which registered significant decline during the review period, is anticipated to remain steady at US$1.88 billion during the forecast period. The country's defense expenditure will continue to be driven by factors such as participation in peace keeping missions, joint training operations, and improvements in border control measures. 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 compared to defense expenditure.

What are the key drivers behind recent market changes?
Romania is expected to invest US$9.39 billion in the fulfillment of its defense requirements. The defense expenditure of Romania is primarily driven by the country's participation in various international peacekeeping missions, joint operations with the police force for the internal security of the country, and modernization of the armed forces, primarily by acquiring second-hand equipment.

What makes this report unique and essential to read?
The Romanian 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 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 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 Romanian defense industry.

The report covers the porters 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 Romania. 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
Romania is expected to invest US$9.39 billion in its armed forces, of which expenditure on the acquisition of military hardware is forecast to be US$1.56 billion, offering foreign OEMs limited opportunities to cater to the Romanian defense industry. Due to the economic crisis, Romania had postponed the procurement of...
equipment in 2011, which resulted in dropping shares of capital expenditure in overall defense expenditure.

According to Transparency International’s 2011 Corruption Perceptions Index, Romania dropped in rank to 25th in the EU. 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 entering the market.

As a result of low investment on R&D of advanced technology defense systems, the country’s defense capabilities are limited in terms of production of aircraft, small arms, and ammunition. Many domestic companies act as subcontractors to larger European and US defense companies. This forced the country to import defense equipment such as air defense systems, sensors, aircraft and aircraft parts, armored vehicles, missiles, and engines, as domestic suppliers lack the capabilities to manufacture advanced defense systems.

Key Highlights
Romanian defense expenditure, estimated at US$1.64 billion during 2012, declined at a CAGR of -11.96% during the review period. During the forecast period, it is expected to record a CAGR of 6.78% and reach US$2.14 billion by 2016. Over the next five years the country’s defense expenditure will be driven by factors such as participation in peace keeping missions, joint training operations, and improvements in border control measures.

The country’s homeland security budget is expected to be driven by the policing of human trafficking, smuggling, and cybercrime. The danger of weapons and drug smuggling from Transnistria, a small breakaway republic from Moldova, makes the country’s border security particularly challenging. In order to counter the threats posed by these criminal activities, the country is expected to invest in surveillance and intelligence technologies such as electronic identification documents, e-passports, automated border crossing systems, and CCTV systems.

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