The French Defense Industry: Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017

Description: Product Synopsis
This report is the result of ICD Research / Strategic Defence Intelligence's extensive market and company research covering the French 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 French defense Industry Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017 offers the reader an insight into the market opportunities and entry strategies adopted by foreign original equipment manufacturers (OEMs) to gain market share in the French defense industry.

What is the current market landscape and what is changing?
France has the world's third-largest defense expenditure, and, during the review period, the defense budget recorded a CAGR of -0.52%. Expenditure is primarily driven by potential terrorist threats, participation in peacekeeping initiatives and efforts to modernize the country's defense forces with advanced technology equipment. The defense budget, which stood at 1.91% of GDP in 2012, is expected to increase to 1.92% of GDP by 2017, as a consequence of GDP growth in the economy. During the review period, the average capital expenditure allocation stood at 40% of the total defense budget, and this is expected to increase to an average of 42% during the forecast period. The common services of defense, such as healthcare expenses, are expected to receive the highest allocation of the French defense budget, at 52%, throughout the forecast period.

What are the key drivers behind recent market changes?
The French defense budget is currently driven by efforts to modernize the army, threats from terrorist organizations, and active participation in peacekeeping missions. France perceives global terrorism as a threat to its national security, and is concerned that it may be a potential target for Islamic extremist organizations. The country is an active participant in international peacekeeping operations, and is a permanent member of the UN Security Council.

What makes this report unique and essential to read?
The French defense Industry Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017 provides detailed analysis of the current industry size and growth expectations from 2013 to 2017, 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 2013 to 2017, 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 their implications and impact on the French 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 France. 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
France imports 30%, of which 20% is procured from other European countries such as Italy and Austria. The country imports advanced technology equipment such as sensors, engines and artillery and engages in technology transfers. Historically, the US was the largest supplier of arms to France; however the country has recently begun to import from European countries such as Italy, Austria and Germany.

France has no offset obligations for defense imports and follows a restrictive foreign investment policy, which does not allow the foreign acquisition of domestic defense companies without governmental approval. The French foreign direct investment (FDI) policy restricts investment in the defense sector, as prior approval from the French government is required for such an investment. This restrictive foreign investment policy, coupled with a preference for domestically produced defense equipment, ensures that the domestic defense industry is protected from the potential competition of global companies.

France has announced the implementation of defense budget reductions in order to reduce the country's fiscal deficit. The majority of the defense products manufactured by the domestic defense industry are procured by the government; therefore the proposed reductions will have an adverse impact on the domestic defense industry, which will be forced to venture into foreign defense markets. The foreign defense companies that cater to French defense requirements are challenged by both the strict limits on foreign investment policy, and a defense policy that prioritizes domestically manufactured goods.

Key Highlights
During the review period, French defense expenditure declined at a CAGR of -0.52% and in 2011, valued at US$50.36 billion. The military modernization plans outlined in the French white paper on defense and national security, coupled with perceived terrorist threats and France's status as the United Nations Security Council's second-largest contributor to UN peacekeeping missions, stimulated defense expenditure during the review period. Such factors are expected to continue to fuel defense expenditure during the forecast period.

French homeland security expenditure is primarily driven by the perceived threat of terrorist attacks. Recent attacks include a false bomb alert at the Eiffel Tower in Paris and the kidnapping of five French workers and two of their African colleagues in Niger. In May 2005, Al-Qaeda declared France an enemy, and a recent senate vote to ban Islamic clothing in the country is expected to cause social unrest. In addition, the French intelligence services have previously identified intelligence regarding possible terrorist attacks on the Parisian transport system. The French homeland security expenditure stood at US$22.6 billion in 2008 and grew at a CAGR of 6.76% to reach US$23.98 billion in 2010.

French defense equipment imports are commonly made in order to acquire technology that domestic defense companies do not possess. The country imports through foreign military sales or direct commercial sales with technology transfers, in order to ensure the domestic production, repair, and maintenance of equipment. In addition, France has also participated in a number of joint development programs involving many countries, which increase the scale of production and offer shared development costs. Therefore, collaboration with France on equipment development is another promising entry route.
3.2.6. Naval expenditure estimated to total US$XX billion during the forecast period
3.2.7. Common services capital expenditure allocation expected to average XX% during the forecast period
3.2.8. Defense expenditure expected to reach XX% of GDP by 2017
3.3. Homeland Security Market Size and Forecast
3.3.1. Homeland security expenditure expected to reach US$XX billion by 2017
3.3.2. France falls under “some risk” category in the terrorism index
3.3.3. France has a terrorism index score of XX
3.3.4. France expected to invest in emergency advance warning and information systems, and other surveillance and monitoring systems
3.4. Benchmarking with Key Global Markets
3.4.1. France has the world's third-largest defense expenditure
3.4.2. France expected to have fourth-largest global defense expenditure by 2016
3.4.3. France invests XX% of GDP in defense, the seventh-largest allocation globally
3.4.4. France ranked fourth among top global arms exporters during 2008-2012
3.4.5. France faces moderate risk of terror attacks
3.5. Market Opportunities: Key Trends and Drivers
3.5.1. France to invest in armored vehicles, infantry combat kits and long range rockets
3.5.2. France to invest in mistral class amphibious ships and nuclear attack submarines
3.5.3. France expected to improve aerial capabilities through investment in UAVs and fighter aircraft
3.5.4. Demand for command, control and communication systems is expected to increase
3.5.5. Demand for UAV tactical drone systems is expected to increase
4 Defense Procurement Market Dynamics
4.1. Import Market Dynamics
4.1.1. The company acquires the majority of its defense equipment from domestic companies
4.1.2. Increased demand for improved early warning systems expected to increase advanced sensors and engine imports
4.1.3. Imports increasing from European nations such as Italy and Germany
4.2. Export Market Dynamics
4.2.1. France is the world's fourth-largest exporter of defense goods
4.2.2. French export market expanding in Southeast Asian countries
4.2.3. Ships and aircraft constitute the majority of French defense exports
5 Industry Dynamics
5.1. Five Forces Analysis
5.1.1. Bargaining power of Supplier: Low
5.1.2. Bargaining power of Buyer: Medium to High
5.1.3. Barrier to entry: High
5.1.4. Intensity of rivalry: Medium
5.1.5. Threat of Substitution: Medium
6 Market Entry Strategy
6.1. Market Regulation
6.1.1. France has no offset obligations for defense imports
6.1.2. Foreign direct investment in the defense sector is subject to prior official approval
6.2. Market Entry Route
6.2.1. Foreign military or direct commercial sales with technology transfers are the preferred entry routes
6.2.2. International product collaborations favored by the French government
6.3. Key Challenges
6.3.1. Government defense budget reductions expected to have a negative impact on defense companies
6.3.2. Restrictive foreign policies and support for domestic companies pose a challenge for the entry of non-European companies in the French defense market
7 Competitive landscape and Strategic Insights
7.1. Competitive landscape Overview
7.2. Key Public Sector Companies
7.2.1. Dassault Aviation: Overview
7.2.2. Dassault Aviation: Major Products and Services
7.2.3. Dassault Aviation: Recent Announcements and Strategic Initiatives
7.2.4. Dassault Aviation: Alliances
7.2.5. Dassault Aviation: Recent Contract Wins
7.2.6. Dassault Aviation: Financial Analysis
7.2.7. Thales: Overview
7.2.8. Thales: Major Products and Services
7.2.9. Thales: Recent Announcements and Strategic Initiatives
7.2.10. Thales: Alliances
7.2.11. Thales: Recent Contract Wins
8.2.7. Exports of services, current prices
8.2.8. Fiscal Balance as a percentage of GDP
8.2.9. Foreign Direct Investment
8.2.10. GDP at Purchasing Power Parity
8.2.11. GDP, Constant Prices (Local Currency)
8.2.12. GDP, Constant Prices (US$)
8.2.13. GDP, Current Prices (Local Currency)
8.2.14. GDP, Current Prices (US$)
8.2.15. General Government Final Consumption Expenditure
8.2.16. Gross Fixed Capital Formation, Current Prices
8.2.17. Imports of goods and services
8.2.18. Imports of goods and services
8.2.19. Inflation, average consumer prices
8.2.20. Manufacturing Output, Current Prices (Local Currency Bn)
8.2.21. Manufacturing Output, Current Prices (US$ Billions)
8.2.22. US$- Exchange Rate (EoP)
8.2.23. Wholesale Price Index
8.3. Energy and Utilities
8.3.1. Crude Oil Distillation Capacity
8.3.2. Electricity Exports
8.3.3. Electricity Imports
8.3.4. Electricity Installed Capacity
8.3.5. Fossil Fuels Proved Natural Gas Reserves
8.3.6. Fossil Fuels Proved Oil Gas Reserves
8.3.7. Hydroelectricity Installed Capacity
8.3.8. Natural Gas Consumption
8.3.9. Natural Gas Imports
8.3.10. Natural Gas Production
8.3.11. Net Conventional Thermal Electricity Generation
8.3.13. Net Hydroelectric Power Generation
8.3.14. Nuclear Electricity Net Generation
8.3.15. Petroleum Consumption
8.3.16. Petroleum Production
8.4. Labor
8.4.1. People employed in R&D
8.5. Minerals
8.5.1. Coal Consumption
8.6. Social & Political Risk
8.6.1. Political Stability Index
8.6.2. Transparency Index
8.7. Technology
8.7.1. Gross Domestic Expenditure on Research and Development as % of GDP
8.7.2. Investment in Telecommunication
8.7.3. Patents Granted
8.7.4. Software and computer-related services, Value Added
8.7.5. Software Patents
8.8. Telecommunication
8.8.1. Fixed line calling cost local
8.8.2. Fixed line calling cost National
9 Appendix
9.1. Contact Us
9.2. About SDI
9.3. Disclaimer

Ordering:
Order Online - http://www.researchandmarkets.com/reports/2165262/
Order by Fax - using the form below
Order by Post - print the order form below and send to
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

| Product Name: | The French Defense Industry: Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017 |
| Web Address: | http://www.researchandmarkets.com/reports/2165262/ |
| Office Code: | SCD2PW4S |

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Product Format:</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User:</td>
<td>□ USD 1250</td>
</tr>
<tr>
<td>Electronic (PDF) - Site License:</td>
<td>□ USD 2500</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide:</td>
<td>□ USD 3750</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

<table>
<thead>
<tr>
<th>Title:</th>
<th>Mr [ ] Mrs [ ] Dr [ ] Miss [ ] Ms [ ] Prof [ ]</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
<td>Last Name:</td>
</tr>
<tr>
<td>Email Address: *</td>
<td></td>
</tr>
<tr>
<td>Job Title:</td>
<td></td>
</tr>
<tr>
<td>Organisation:</td>
<td></td>
</tr>
<tr>
<td>Address:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
</tr>
<tr>
<td>Postal / Zip Code:</td>
<td></td>
</tr>
<tr>
<td>Country:</td>
<td></td>
</tr>
<tr>
<td>Phone Number:</td>
<td></td>
</tr>
<tr>
<td>Fax Number:</td>
<td></td>
</tr>
</tbody>
</table>

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:
Marketing Code: 

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World