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

Description: This report is the result of ICD Research / Strategic Defence Intelligence's extensive market and company research covering the German 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 German Defense Industry Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017 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 German defense industry.

What is the current market landscape and what is changing?

The German defense market registered marginal decline during the review period and is expected to decline further during forecast period. The German defense budget, which valued US$41.4 billion in 2012, is the eighth largest defense budget in the world. Defense expenditure declined at a CAGR of -0.17% during the review period.

What are the key drivers behind recent market changes?

Germany is expected to invest US$199.7 billion of its defense expenditure in the fulfillment of its defense requirements. Factors such as security of the border and the international threat of terrorism are expected to stimulate defense expenditure during the forecast period. During 2007-2011, Germany was the world's third largest exporter of defense products, with exports to 58 countries.

What makes this report unique and essential to read?

The German Defense Industry Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017 provides detailed analysis of the current industry size and growth expectations from 2012 to 2017, 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 of the defense market.

Key Features and Benefits

The report provides detailed analysis of the current industry size and growth expectations from 2012 to 2017, 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 their implications and impact on the German 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 Germany. 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

As a result of the European debt crisis and subsequent budget cuts, the German MoD is expected to reduce its expenditure on military aircraft and other arms contracts over the next four years. The German government has suspended compulsory military service and plans to further downsize the civilian and military manpower.

Key Highlights

In the defense budget for 2012, the German government plans to make advancements in the information technology sector through the procurement of the latest technology systems. After the trial of full body scanners at airports in 2011, there are plans of expansion in video surveillance at train stations and airports, as part of increased security measures, and the development of digital radios for local authorities for improved communication and efficiency.

During the review period, ships and armored vehicles were the main categories in defense exports by Germany. During 2007-2011, Germany exports defense products to 58 countries with total value of US$11.8 billion. Exports declined in 2011, but defense exports are expected to recover during the forecast period with domestic defense companies.

Contents:

1 Introduction
   1.1. What is this Report About?
   1.2. Definitions
   1.3. Summary Methodology
   1.4. SDI Terrorism Index
   1.5. About Strategic Defence Intelligence

2 Executive Summary

3 Market Attractiveness and Emerging Opportunities
   3.1. Defense Market Size Historical and Forecast
      3.1.1. German defense expenditure to decline at a CAGR of XX% during the forecast period
      3.1.2. Defense expenditure driven by factors such as security of EU, peacekeeping initiatives, and A400M development program
      3.1.3. German defense expenditure as a percentage of GDP expected to decrease
   3.2. Analysis of Defense Budget Allocation
      3.2.1. XX% of defense budget allocated for the acquisition of advanced technology and equipment
      3.2.2. Per capita defense expenditure expected to decrease during the forecast period
      3.2.3. Air force receives largest capital expenditure allocation
      3.2.4. Capital expenditure for army is expected to decrease due to budget cuts
      3.2.5. Air force capital expenditure is expected to decrease over the forecast period
      3.2.6. Navy capital expenditure to decline during forecast period
   3.3. Homeland Security Market Size and Forecast
      3.3.1. German homeland security worth US$XX billion in 2012
      3.3.2. Preventive defense measures used to counter terrorism threat
      3.3.3. Germany falls under “some risk” of terrorism category
   3.4. Benchmarking with Key Global Markets
      3.4.1. Germany defense budget expected to be marginally decline over the forecast period
      3.4.2. Germany has the ninth-largest defense budget in the world
      3.4.3. Germany allocates lower share of GDP for defense compared to US and European countries
      3.4.4. Germany faces some threat from foreign terrorist organizations
   3.5. Market Opportunities: Key Trends and Growth Stimulators
      3.5.1. Surveillance technology and services market to boom in Germany
      3.5.2. Demand for heavy lift helicopters to increase
      3.5.3. Increased spending on Interactive Defense and Attack System for Submarines weapons
      3.5.4. Demand for medium-altitude long-endurance (MALE) UAVs will increase
      3.5.5. German plans to procure armored vehicles will increase business opportunities

4 Defense Procurement Market Dynamics
   4.1. Import Market Dynamics
      4.1.1. Network-centric warfare capability for peacekeeping initiatives drive defense imports
      4.1.2. Defense imports are expected to remain low during the forecast period
RESEARCH AND MARKETS

4.1.3. US was Germany’s leading arms suppliers during 2007-2011
4.1.4. Missiles, armored vehicles and sensors are most imported military hardware

4.2. Export Market Dynamics
4.2.1. Superior defense technology and strong trade relationships with other countries will continue to drive defense exports
4.2.2. Arms exports to recover during the forecast period
4.2.3. Germany as the world’s third largest defense exporter after the US and Russia
4.2.4. Ships and armored vehicles are the main exported defense products

5 Industry Dynamics
5.1. Five Forces Analysis
5.1.1. Bargaining power of supplier: low
5.1.2. Bargaining power of buyer: high
5.1.3. Barrier to entry: low
5.1.4. Intensity of rivalry: low
5.1.5. Threat of substitution: low

6 Market Entry Strategy
6.1. Market Regulation
6.1.1. Investment policy promotes XX% FDI in the defense industry
6.2. Market Entry Route
6.2.1. Foreign defense OEMs form large conglomerates to enter the market
6.2.2. Foreign OEMs establish subsidiaries or form JV to enter the industry
6.3. Key Challenges
6.3.1. The European debt crisis will negatively affect defense procurements
6.3.2. Modernization of military through downsizing existing systems and personnel
6.3.3. German arms exports to large defense markets outside EU are minimal

7 Competitive Landscape and Strategic Insights
7.1. Competitive Landscape Overview
7.1.1. Foreign OEMs have strong collaborations with domestic defense firms
7.2. Key Domestic Companies
7.2.1. Heckler and Koch: overview
7.2.2. Heckler and Koch: products and services
7.2.3. Heckler and Koch: recent announcement and strategic initiatives
7.2.4. Heckler and Koch: recent contract wins
7.2.5. MAN Truck and Bus AG: overview
7.2.6. MAN Truck and Bus AG: products and services
7.2.7. MAN Truck and Bus AG: recent announcement and strategic initiatives
7.2.8. MAN Truck and Bus AG: alliances
7.2.9. Eurocopter: overview
7.2.10. Eurocopter: products and services
7.2.11. Eurocopter: recent announcement and strategic initiatives
7.2.12. Eurocopter: alliances
7.2.13. Eurocopter: recent contract wins
7.2.14. ESG Elektroniksystem- und Logistik: overview
7.2.15. ESG Elektroniksystem- und Logistik: products and services
7.2.16. ESG Elektroniksystem- und Logistik: recent announcement and strategic initiatives
7.2.17. ESG Elektroniksystem- und Logistik: alliances
7.2.18. ESG Elektroniksystem- und Logistik: recent contract wins
7.2.19. Diehl Stiftung: overview
7.2.20. Diehl Stiftung: products and services
7.2.21. Diehl Stiftung: recent announcement and strategic initiatives
7.2.22. Diehl Stiftung: alliances
7.2.23. Diehl Stiftung: recent contract wins
7.2.24. ThyssenKrupp Marine Systems: overview
7.2.25. ThyssenKrupp Marine Systems: products and services
7.2.26. ThyssenKrupp Marine Systems: recent announcement and strategic initiatives
7.2.27. ThyssenKrupp Marine Systems: alliances
7.2.28. ThyssenKrupp Marine Systems: recent contract wins
7.2.29. Thales Deutschland: overview
7.2.30. Thales Deutschland: products and services
7.2.31. Thales Deutschland: recent announcement and strategic initiatives
7.2.32. Thales Deutschland: alliances
7.2.33. Thales Deutschland: recent contract wins
7.2.34. EADS: overview
7.2.35. EADS: products and services
7.2.36. EADS: recent announcement and strategic initiatives
7.2.37. EADS: alliances
7.2.38. EADS: recent contract wins
7.2.39. EADS: financial analysis
7.2.40. Airbus Military: overview
7.2.41. Airbus Military: products and services
7.2.42. Airbus Military: recent announcement and strategic initiatives
7.2.43. MBDA: overview
7.2.44. MBDA: products and services
7.2.45. MBDA: recent announcement and strategic initiatives
7.2.46. MBDA: alliances
7.2.47. MBDA: recent contract wins
7.2.48. Eurofighter Jagdflugzeug: overview
7.2.49. Eurofighter Jagdflugzeug: products and services
7.2.50. Eurofighter Jagdflugzeug: recent announcement and strategic initiatives
7.2.51. Eurofighter Jagdflugzeug: recent contract wins
7.2.52. Rheinmetall: overview
7.2.53. Rheinmetall: products and services
7.2.54. Rheinmetall: recent announcement and strategic initiatives
7.2.55. Rheinmetall: alliances
7.2.56. Rheinmetall: recent contract wins
7.2.57. Rheinmetall: financial analysis

8 Business Environment and Country Risk
8.1. Demographics and Social Statistics
8.1.1. Population - Female
8.1.2. Population - Male
8.2. Economic Performance
8.2.1. Business Confidence index
8.2.2. Construction Output, Current Prices, Local Currency
8.2.3. Construction Output, Current Prices, US Dollars
8.2.4. Current Account Balance as Percentage of GDP
8.2.5. Exports of goods and services, current prices
8.2.6. Fiscal Balance as a percentage of GDP
8.2.7. Foreign Direct Investment
8.2.8. GDP at Purchasing Power Parity
8.2.9. GDP, Constant Prices (Local Currency)
8.2.10. GDP, Constant Prices (US$)
8.2.11. GDP, Current Prices (Local Currency)
8.2.12. GDP, Current Prices (US$)
8.2.13. General Government Final Consumption Expenditure
8.2.15. Imports of goods and services
8.2.16. Inflation, average consumer prices
8.2.17. Manufacturing Output, Current Prices (Local Currency Bn)
8.2.18. Manufacturing Output, Current Prices (US$ Billions)
8.2.19. US$- Exchange Rate (EoP)
8.2.20. 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 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
Table 33: Diehl Stiftung - Alliances
Table 34: Diehl Stiftung - Recent Contract Wins
Table 35: ThyssenKrupp Marine Systems - Product focus
Table 36: ThyssenKrupp Marine Systems - Alliances
Table 37: ThyssenKrupp Marine Systems - Recent Contract Wins
Table 38: Thales Deutschland - Product focus
Table 39: Thales Deutschland - Alliances
Table 40: Thales Deutschland - Recent Contract Wins
Table 41: EADS - Product focus
Table 42: EADS - Alliances
Table 43: EADS - Recent Contract Wins
Table 44: Airbus Military - Product focus
Table 45: MBDA - Product focus
Table 46: MBDA - Alliances
Table 47: MBDA - Recent Contract Wins
Table 48: Eurofighter Jagdflugzeug - Product focus
Table 49: Eurofighter Jagdflugzeug - Recent Contract Wins
Table 50: Rheinmetall - Product focus
Table 51: Rheinmetall - Alliances
Table 52: Rheinmetall - Recent Contract Wins

List of Figures:

Figure 1: German Defense Expenditure (US$ Billion), 2008-2012
Figure 2: German Defense Expenditure (US$ Billion), 2013-2017
Figure 3: German GDP Growth vs. Defense Expenditure Growth and Defense Expenditure as Percentage of GDP Growth, 2008-2012
Figure 4: German GDP Growth vs. Defense Expenditure Growth and Defense Expenditure as Percentage of GDP Growth, 2013-2017
Figure 5: German Defense Budget Split Between Capital and Revenue Expenditure (%), 2008-2012
Figure 6: German Defense Budget Split Between Capital and Revenue Expenditure (%), 2013-2017
Figure 7: German per capita defense expenditure (US$), 2008-2012
Figure 8: German per capita defense expenditure (US$), 2013-2017
Figure 9: German Defense Capital Expenditure Breakdown (%), 2008-2012
Figure 10: German Defense Capital Expenditure Breakdown (%), 2013-2017
Figure 11: German Defense Capital Expenditure for Army (US$ million), 2008-2012
Figure 12: German Defense Capital Expenditure for Army (US$ million), 2013-2017
Figure 13: German Defense Capital Expenditure for Air Force (US$ million), 2008-2012
Figure 14: German Defense Capital Expenditure for Air Force (US$ million), 2013-2017
Figure 15: German Defense Capital Expenditure for Navy (US$ million), 2008-2012
Figure 16: German Defense Capital Expenditure for Navy (US$ million), 2013-2017
Figure 17: German Homeland Security Budget, 2008-2012
Figure 18: German Homeland Security Budget, 2013-2017
Figure 19: SDI Terrorism Heat Map, 2011
Figure 20: SDI Terrorism Index, 2011
Figure 21: Benchmarking with Key Markets - 2007-2011 vs. 2012-2016
Figure 22: Defense Expenditure of the World’s Largest Military Spenders (US$ Billion), 2011 and 2016
Figure 23: Defense Expenditure as a Percentage of GDP of Largest Military Spenders (%), 2011
Figure 24: German Defense Import Trend, 2007-2011 (TIV values)
Figure 25: German Defense Imports by Country (%), 2007-2011
Figure 26: German Defense Imports by Category (%), 2007-2011
Figure 27: German Defense exports by Value (%), 2007-2011
Figure 28: German Defense exports by Country (%), 2007-2011
Figure 29: German Defense Imports by Category (%), 2007-2011
Figure 30: Industry Dynamics Porter’s Five Forces Analysis
Figure 31: EADS - Revenue Trend Analysis (EUR Billion), 2007-2011
Figure 32: EADS - Operating Profit Trend Analysis (EUR Million), 2007-2011
Figure 33: EADS - Net Profit Trend Analysis (EUR Million), 2007-2011
Figure 34: Rheinmetall - Revenue Trend Analysis (EUR Billion), 2007-2011
Figure 35: Rheinmetall - Operating Profit Trend Analysis (EUR Million), 2007-2011
Figure 36: Rheinmetall - Net Profit Trend Analysis (EUR Million), 2007-2011
Figure 37: Germany Population - Female (In Millions), 2008-2017
Figure 38: Germany Population - Male (In Millions), 2008-2017
Figure 39: Germany Business Confidence index, 2003-2012
Figure 40: Germany Construction Output, Current Prices, Local Currency (In Billions), 2001-2010
Figure 41: Germany Construction Output, Current Prices, US Dollars (In Billions), 2001-2010
Figure 42: Germany Current Account Balance as Percentage of GDP, 2008-2017
Figure 43: Germany Exports of goods and services, current prices (US$ Billion), 2001-2010
Figure 44: Germany Fiscal Balance as a percentage of GDP, 2001-2010
Figure 45: Germany Foreign Direct Investment (US$ Billion), 2001-2010
Figure 46: Germany GDP at Purchasing Power Parity (US$ Billion), 2006-2015
Figure 47: Germany GDP at Constant Prices (Local Currency Billion), 2006-2015
Figure 48: Germany GDP at Constant Prices (US$ Billion), 2006-2015
Figure 49: Germany General Government Final Consumption Expenditure (US$ Billion), 2001-2010
Figure 50: Germany Gross Fixed Capital Formation, Current Prices (US$ Billion), 2001-2010
Figure 51: Germany Imports of goods and services (current US$ Billion), 2001-2010
Figure 52: Germany Inflation, average consumer prices, 2008-2017
Figure 53: Germany Manufacturing Output, Current Prices (Local Currency Billion), 2001-2010
Figure 54: Germany Manufacturing Output, Current Prices (US$ Billion), 2001-2010
Figure 55: Germany US$ Exchange Rate (EoP), 2002-2011
Figure 56: Germany Wholesale Price Index, 2000-2009
Figure 57: Germany Crude Oil Distillation Capacity (Thousand Barrels Per Cal Day), 2000-2009
Figure 58: Germany Electricity Exports (Billion Kilowatt hours), 2001-2010
Figure 59: Germany Electricity Installed Capacity (Million Kilowatts), 2000-2009
Figure 60: Germany Electricity Imports (Billion Kilowatt hours), 2001-2010
Figure 61: Germany Electricity Installed Capacity (Million Kilowatts), 2000-2009
Figure 62: Germany Electricity Installed Capacity (Million Kilowatts), 2000-2009
Figure 63: Germany Fossil Fuels Proved Natural Gas Reserves (Trillion Cubic Feet), 2002-2011
Figure 64: Germany Fossil Fuels Proved Oil Reserves (Billion Barrels), 2002-2011
Figure 65: Germany Fossil Fuels Proved Natural Gas Reserves (Million Cubic Feet), 2000-2009
Figure 66: Germany Fossil Fuels Proved Oil Reserves (Thousand Barrels Per Day), 2000-2009
Figure 67: Germany Fossil Fuels Proved Natural Gas Reserves (Million Barrels), 2000-2009
Figure 68: Germany Fossil Fuels Proved Natural Gas Reserves (Million Cubic Feet), 2000-2009
Figure 69: Germany Fossil Fuels Proved Natural Gas Reserves (Trillion Cubic Feet), 2000-2009
Figure 70: Germany Fossil Fuels Proved Natural Gas Reserves (Million Barrels), 2000-2009
Figure 71: Germany Fossil Fuels Proved Natural Gas Reserves (Million Cubic Feet), 2000-2009
Figure 72: Germany Fossil Fuels Proved Natural Gas Reserves (Trillion Cubic Feet), 2000-2009
Figure 73: Germany Fossil Fuels Proved Natural Gas Reserves (Million Cubic Feet), 2000-2009
Figure 74: Germany Fossil Fuels Proved Natural Gas Reserves (Million Barrels), 2000-2009
Figure 75: Germany Fossil Fuels Proved Natural Gas Reserves (Thousand Barrels Per Day), 2000-2009
Figure 76: Germany Fossil Fuels Proved Natural Gas Reserves (Million Cubic Feet), 2000-2009
Figure 77: Germany Fossil Fuels Proved Natural Gas Reserves (Trillion Cubic Feet), 2000-2009
Figure 78: Germany Fossil Fuels Proved Natural Gas Reserves (Million Cubic Feet), 2000-2009
Figure 79: Germany Fossil Fuels Proved Natural Gas Reserves (Million Barrels), 2000-2009
Figure 80: Germany Fossil Fuels Proved Natural Gas Reserves (Thousand Barrels Per Day), 2000-2009
Figure 81: Germany Fossil Fuels Proved Natural Gas Reserves (Million Cubic Feet), 2000-2009
Figure 82: Germany Fossil Fuels Proved Natural Gas Reserves (Million Barrels), 2000-2009
Figure 83: Germany Fossil Fuels Proved Natural Gas Reserves (Thousand Barrels Per Day), 2000-2009
Figure 84: Germany Fossil Fuels Proved Natural Gas Reserves (Million Cubic Feet), 2000-2009
Figure 85: Germany Fossil Fuels Proved Natural Gas Reserves (Million Barrels), 2000-2009
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