The Japanese 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 Japanese 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 Japanese 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 Japanese defense industry.

What is the current market landscape and what is changing?

The Japanese defense budget is the fourth-largest in the world and recorded a CAGR of 6.25% during the review period, to reach US$59.06 billion in 2012. During the review period, Japan capped its defense budget at 0.99% of GDP, and is expected to continue to do so over the forecast period. The Japanese MoD spends the majority of its defense budget on revenue expenditure, which includes the salaries of personnel and maintenance of infrastructure. In terms of the armed forces, the Japanese army receives 36.8% of the budget, while the navy and air force receive shares of 23% and 23.5% respectively.

What are the key drivers behind recent market changes?

Rising military power of North Korea and security of sea trade routes are the primary drivers of defense expenditure. Japan's defense expenditure will continue to rise due to the perceived threat posed by the rising military strength of its neighbor, North Korea. Furthermore, the scarce natural resources of Japan mean that it is crucial to secure its sea routes to ensure safe trade routes. As Japan is an island, the security of its maritime borders from illegal intruders and external forces is paramount. Therefore, the country's maritime forces must maintain surveillance through patrol ships, aircraft and search and rescue helicopters in order to defend its commercial ships in emergency situations.

What makes this report unique and essential to read?

The Japanese 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

Market opportunity and attractiveness

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.

Procurement dynamics

The report includes trend analysis of imports and exports, together with their implications and impact on the Japanese defense industry.
Industry structure

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

Market entry strategy

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.

Competitive landscape and strategic insights

The report helps the reader to understand the competitive landscape of the defense industry in Japan. 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

Japan does not have an offset policy for arms imports

The Japanese government does not have an offset policy for its defense procurements. Instead, the government imports technology for the equipment for which advanced technology is not available domestically.

Investment in defense industry requires prior notification

The Japanese defense investment policy insists on the government's prior approval for investment in the defense industry. The government considers defense to be a sensitive industry and reviews potential investments in terms of their threat to national security, public order, public safety and the economy. The review time required is generally 30 days from the date of notification. If the government does not reply within the stipulated time, the proposal for investment is automatically approved, unless the ministry extends the review period if they feel further review is necessary.

The high cost of domestic defense equipment and the difficulties in exporting the Japanese arms are key challenges

Japan follows a policy of procuring indigenous goods and purchasing advanced technology that is unavailable domestically. However, the cost of these licenses are high and the quantity procured by the Japanese government is low, leading to lower economies of scale and higher costs per unit of the product. Even the recent easing of some of its export policy has not brought the desired level of freedom to the indigenous exporters till date.

Key Highlights

Japanese defense budget to reach US$69.46 billion by 2017

While the Japanese defense budget recorded a CAGR of 6.25% during the review period, it is expected to grow at a CAGR of 3.28% over the forecast period, to reach US$69.46 billion by 2017. The country allocates just 16.9% of its defense budget to capital expenditure, while the majority is allocated to revenue expenditure, which includes the salaries of personnel, the maintenance of equipment and the expenditure associated with stationing the US armed forces in Japan.

Homeland security market in Japan valued at US$3.22 billion in 2012

The Japanese homeland security market, as represented by the budget for the police force, valued US$3.22 billion in 2012. This represents an increase of 4.8% over figures from 2011, when the budget stood at US$3.07 billion. The country is expected to make procurements for biometric systems, airport security systems, information security systems, mass transport security systems as well as port security systems.

Defense imports mainly consist of licenses for indigenous production

The Japanese defense industry is highly capable of catering to the demands of its defense forces. However, due to a lack of advanced technology in areas such as aircraft, missiles and missile defense systems,
domestic firms are forced purchase their licenses from foreign firms to produce the equipment indigenously. These acquisitions of developed and tested technologies account for the majority of Japan's defense imports.

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