The Norwegian 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 Norwegian 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 Norwegian 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 Norwegian defense industry.

What is the current market landscape and what is changing?

The Norwegian defense industry recorded a CAGR of 5.03% during the review period to reach a value of US$6.9 billion in 2012, a growth expected to slow to a CAGR of 2.55% over the forecast period to reach a projected value of US$7.8 billion in 2017. Over the forecast period, defense expenditure is expected to grow, primarily due to international commitments, strengthened focus on the northern areas and increase in home guard capabilities. As a percentage of GDP, the country's defense budget in 2012 was 1.4%. The Norwegian homeland security market is driven by growing threat from radical and terrorist organizations.

What are the key drivers behind recent market changes?

International commitments, strengthened focus on the northern areas and increase in home guard capabilities will drive Norwegian defense expenditure over the forecast period. As one of the founding members of NATO, Norway is an active contributor to the UN-led international operations in Afghanistan and Iraq, with the country's main international commitment during the review period having been its involvement in the International Security Assistance Force (ISAF), a NATO-led security mission in Afghanistan established by the United Nations Security Council.

What makes this report unique and essential to read?

The Norwegian 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 a 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 Norwegian 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
The report helps the reader to understand the competitive landscape of the defense industry in Norway. 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

Although Norway allows foreign investors to enter its defense industry, and foreign and domestic investments are treated equally by law, regulations, standards, and practices within the industry often favor Norwegian, Scandinavian, and EEA investors. Furthermore, as the country is a member of the European Defense Agency, preference is given to European defense companies, which increases the barrier to entry for non-European defense companies. Additionally, the country follows a strict offset policy, according to which, offsets are mandatory for all transactions exceeding US$82.2 million and investors are required to reinvest 100% of the value of the contract into the Norwegian economy.

During the review period, Norway increased its defense expenditure due to a number of programs to modernize its armed forces. Consequently, the country is not expected to embark on any major new defense acquisition programs over the forecast period, a reluctance exacerbated by the fact that Norway's GDP growth is expected to slow from its review period CAGR of 5.45%, to a forecast period CAGR of 2.44%. As a result, Norway is expected to reduce its defense procurements, offering limited market opportunities to foreign OEMS keen to enter the country's defense industry.

Key Highlights

The Norwegian defense industry recorded a CAGR of 5.03% during the review period, to reach a value of US$6.9 billion in 2012, a growth expected to slow to a CAGR of 2.55% over the forecast period to reach a projected value of US$7.8 billion in 2017. Furthermore, the country is in the process of modernizing its armed forces and home guard under the new long-term plan for the armed forces and is therefore expected to spend a cumulative total of US$37.2 billion on defense during the forecast period, including US$9.9 billion on capital expenditure.

Norway's homeland security expenditure recorded a CAGR of 8.82% during the review period, its expenditure increasing due to the growing threat from radical and terrorist organizations, such as Al-Qaeda, as a result of Norway's ongoing operations in Afghanistan and Iraq. Over the forecast period, Norwegian expenditure on homeland security is expected to increase from US$3.68 billion in 2011, to US$4.35 billion in 2016, with the majority expected to be spent on the training of new personnel and the rapid response force.

Norwegian defense imports increased in 2008 and started declining in 2009. In 2011, imports registered a significant increase, which is expected to continue during the forecast period on account of the continued modernization of its armed forces. As the capital expenditure budget allocation is expected to increase, imports of defense equipment are also expected to register significant growth over the forecast period. Norwegian defense exports registered a significant increase during 2007-2009, largely due to increased defense transfers to major European countries and the US. Although the exports declined in 2010 and 2011, a focus on the enhancement of its domestic defense industry through collaborations with foreign OEMs will result in increase in exports of Norway during the forecast period.
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<td>ULSBIE2D</td>
</tr>
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<td>IBAN number</td>
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</tr>
<tr>
<td>Bank Address</td>
<td>Ulster Bank, 27-35 Main Street, Blackrock, Co. Dublin, Ireland</td>
</tr>
</tbody>
</table>

If you have a Marketing Code please enter it below:

Marketing Code: __________________________

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