Summary

“The Global Naval Vessels and Surface Combatants Market 2015–2025” report offers the reader detailed analysis of the global naval vessels and surface combatants market over the next ten years, alongside potential market opportunities to enter the industry, using detailed market size forecasts.

The global naval vessels market is estimated to value US$XX billion in 2015. The market consists of five categories of naval vessels: aircraft carriers, destroyers, amphibious ships, frigates and corvettes. The value of the global naval vessels market is expected to increase at a CAGR of XX% during the forecast period, to reach US$XX billion by 2025.

“The Global Naval Vessels and Surface Combatants Market 2015–2025” provides detailed analysis of the current industry size and growth expectations from 2015 to 2025, 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 Findings

The global naval vessels and surface combatants market is expected to be worth US$XX billion in 2015 and is expected increase to US$XX billion by 2025, representing a CAGR of XX% during the forecast period. The expenditure on naval vessels is expected to be driven by the ongoing global turmoil, internal and external security threats, fleet replacement programs, modernization strategies and territorial disputes across the world. Additionally, emerging economies in the Middle East and South Asian regions are witnessing increasing defense expenditure and are therefore likely to present global naval vessels manufacturers with greater opportunities in the coming decade. Cumulatively, the global market is expected to value US$XX billion during the forecast period.

Key Features and Benefits

The report provides detailed analysis of the Naval Vessels and Surface Combatants market during 2015–2025, including the factors that influence why countries are investing or cutting expenditure on naval vessels. It provides detailed expectations of growth rates and projected total expenditure. The report will also provide a deep qualitative analysis of the global naval vessels market covering sections including demand drivers, SWOT, industry trends, latest technological developments, among others. The major programs section will inform the user about programs being undertaken within the global naval vessels and surface combatants departments in different segments of the market.

The naval vessels and surface combatants market is anticipated to be dominated by North America followed by Asia Pacific and Europe. The US is the largest spender, with a cumulative expenditure of US$XX billion over the next decade. Expenditure in the Asia-Pacific region, which occupies XX% of the global market share, is driven by emerging nations, such as China, India, and Taiwan, among others. Europe occupies XX% of the global naval vessels market share, and expenditure is driven by the need to upgrade or replace aging fleets in most nations. In spite of the budgetary restraints faced by a majority of the countries in this region, the European market is expected to grow at a nominal CAGR of XX% during 2015-2025.
1 Global Naval Vessels and Surface Combatants Market Size and Drivers

1.1 Naval Vessels and Surface Combatants Market Size and Forecast 2015–2025

1.1.1 Global Naval Vessels and Surface Combatants market to show positive growth during the forecast period

The global naval vessels and surface combatants market is estimated to value US$XX billion in 2015, and will increase at a CAGR of XX% during the forecast period, to reach US$XX billion by 2025. The market consists of five categories of surface combatants: corvettes, frigates, destroyers, amphibious ships, and aircraft carriers. The market is mainly driven by high levels of expenditure by emerging economies in the Asia Pacific region such as India and China. The North American region is expected to maintain its leading position exhibiting a steady pace of growth over the forecast period. The European region, which has born the full brunt of the global financial crisis, is projected to show a modest growth of XX% during 2015-2025. Corvettes are expected to account for XX% of the global naval vessels and surface combatants market, followed by destroyers, frigates, aircraft carriers, and amphibious ships, with a share of XX%, XX%, XX%, and XX%, respectively. During the forecast period, cumulative global expenditure on naval vessels and surface combatants is expected to reach US$XX billion.

The chart below shows the expected naval vessels and surface combatants market value during 2015–2025:

![Figure 1: Global Naval Vessels and Surface Combatants Market (US$ Billion), 2015–2025](source: SDI analysis)
1.2 Global Naval Vessels and Surface Combatants Market – Regional Analysis

1.2.1 North America dominates the global Naval Vessels and Surface Combatants market

The global naval vessels and surface combatants market is dominated by North America and the US is the largest defense spender in the world; overall, North America is expected to spend US$XX billion on surface combatants during the forecast period. Asia-Pacific represents the second-largest market, with the total naval vessels and surface combatants market valued at US$XX billion, offering a potentially attractive investment opportunity for western firms. Due to defense budget cuts announced by most countries in the region, Europe is projected to spend an estimated US$XX billion on naval vessels and surface combatants during the forecast period, followed by the Middle East, Latin America, and Africa with a cumulative expenditure of US$XX billion.

The table below gives a brief overview of the global naval vessels and surface combatants market:

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<tbody>
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<td>North America</td>
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<td>Asia-Pacific</td>
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<td>Europe</td>
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<td>Middle East</td>
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<td>Latin America</td>
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<td>Africa</td>
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<td>Total Naval Vessels and Surface Combatants Market</td>
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Source: SDI analysis © SDI
The following chart shows the regional breakdown of the global naval vessels and surface combatants market:

**Figure 2: Naval Vessels and Surface Combatants Market Breakdown by Region (%), 2015–2025**

- **North America**
- **Asia Pacific**
- **Europe**
- **Africa**
- **Middle East**
- **Latin America**

Source: SDI analysis © SDI
2 SWOT Analysis of the Naval Vessels and Surface Combatants Market

Table 2: SWOT Analysis of the Naval Vessels and Surface Combatants market

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<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
</table>

Source: SDI Analysis © SDI
3 Country Analysis – Naval Vessels and Surface Combatants Market

3.1 United States Market Size and Forecast 2015–2025

The US’ expenditure on naval vessels is driven hugely by its policy of maintaining global military supremacy, especially in light of the threat posed by China’s growing military might and a robust military procurement policy being adopted by a resurgent Russia. Furthermore, the threat posed by the highly volatile military situation in North Korea is also expected to be a significant catalyst to the country’s growing expenditure in the sector over the forecast period. The US Navy plans to deploy XX% of its naval fleet in the Pacific Ocean to re-balance the power in the Eastern parts of the World and aid its allies such as the Philippines and Japan, against the aggression of China.

To achieve this purpose, the US Navy is required to maintain a fleet of no less than XX operational aircraft carriers, and at least XX cruisers and destroyers consistently over the long run, as per the John Warner National Defense Authorization Act-2007. Moreover, the US Navy estimates that it needs a fleet of XX ships of various types to carry out its missions across the world. However, the country now operates with XX aircraft carriers due to the decommissioning of the aircraft carrier, CVN-65, in 2012. In addition, two more aircraft carriers are scheduled for retirement by 2025, and the US Navy would witness a shortfall of XX% in its fleet, with many destroyers reaching the end of their operational life during the next 15 years. Advertently, the DoD prepared the latest 30-year shipbuilding plan in 2012, under which the navy will procure warships to replace its aging naval vessels, in order to maintain a fleet of more than XX ships during the period 2013-2042. The plan includes the procurement of more than XX ships including Joint High Speed Vessels (JHSVs), amphibious vessels, landing helicopter docks, aircraft carriers, and destroyers over the next two decades.

Expenditure in the MRO sphere is driven by the US Navy’s implementation of one of the biggest ship modernization programs in its history in 2009, which entails refitting and upgrade of its Ticonderoga (CG 47) class cruisers and Arleigh Burke (DDG 51) class destroyers. The total number of ships being considered for modernization is projected to be XX and the MRO processes are expected to be completed over a period of more than XX years. These vessels account for almost a third of the entire fleet and are expected to have complete combat systems installed. These MRO initiatives have arisen from the US DoDs observation that a number of US regional military commanders are placing requirement formulation requests for Ballistic Missile Defense (BMD)-capable Aegis ships, and the number of requests for such capabilities is growing faster than the number of BMD-capable Aegis ships that are currently available. These ships are also undergoing hull, mechanical, and electrical (HM&E) modernization, and will also be equipped with fully-integrated bridges and improved machinery control so as to keep them in full operation throughout their projected XX year service lives. Another factor that is expected to boost the market for US naval vessel MRO is that the US Navy is also expected to extend the service lives of its LSD 41, LSD 49, and LHD 1 class amphibious ships over the next XX years. US spending on naval MRO activities are expected to value US$XX billion in 2015 which is expected to increase at a CAGR of XX% to reach US$XX billion in 2025.

Major programs of the US ship building plan over the period 2015-2025 include the Carrier Replacement program, procuring XX aircraft carriers at an estimated cost of US$XX billion; development of Littoral Combat Ships (LCS), at an approximate cost of US$XX billion; and the development of the Arleigh Burke (DDG-51) and Zumwalt (DDG-1000 series) destroyers, at a combined projected value of US$XX billion over the next ten years. The US market, valued at US$XX billion in 2015, is projected to grow at a CAGR of XX% over the forecast period, to reach US$XX billion by 2025.
The table below gives a brief overview of the US naval vessels and surface combatants market:

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<td>Corvettes</td>
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<tr>
<td>Amphibious ships</td>
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<tr>
<td>Frigates</td>
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<tr>
<td><strong>Total Naval Vessels and Surface Combatants Market</strong></td>
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</tbody>
</table>

Source: SDI analysis © SDI

The chart below shows the naval vessels and surface combatants market size in the US between 2015 and 2025:

Figure 3: Naval Vessels and Surface Combatants Market in the US (US$ Billion), 2015–2025

Source: SDI analysis © SDI
The table below shows the key US naval vessels and surface combatants programs:

<table>
<thead>
<tr>
<th>Program/Equipment Name</th>
<th>Equipment Type</th>
<th>Quantity Procured</th>
<th>Supplier/Country</th>
<th>Delivery Period</th>
<th>Total Contract Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>DDG-51 Destroyers</td>
<td>Destroyer</td>
<td>XX</td>
<td>Huntington Ingalls Industries/US</td>
<td>2015-2022</td>
<td>XX</td>
</tr>
<tr>
<td>Carrier Replacement Program (CVN-79 &amp; 80)</td>
<td>Aircraft Carrier</td>
<td>XX</td>
<td>Huntington Ingalls Industries/US</td>
<td>2015-2025</td>
<td>XX</td>
</tr>
<tr>
<td>LSD (X)</td>
<td>Amphibious Ships</td>
<td>XX</td>
<td>NA</td>
<td>2017-2031</td>
<td>XX</td>
</tr>
<tr>
<td>Littoral Combat Ships</td>
<td>Corvette</td>
<td>XX</td>
<td>Lockheed Martin and General Dynamics/US</td>
<td>2015-2025</td>
<td>XX</td>
</tr>
<tr>
<td>Joint High Speed Vessel (JHSV)</td>
<td>Corvette</td>
<td>XX</td>
<td>Austal /US</td>
<td>2015-2025</td>
<td>XX</td>
</tr>
</tbody>
</table>

Source: SDI analysis © SDI
The following chart shows the category break-up of the naval vessels market in the US from 2015–2025:

Figure 4: Naval Vessels and Surface Combatants Market Split By Category in the US (%), 2015–2025

Source: SDI analysis © SDI
Report Methodology

Strategic Defense Intelligence (SDI) dedicated research and analysis teams consist of experienced professionals with a background in industry research and consulting in the defense sector. The market size is derived by consolidating ongoing procurement programs, modernization initiatives, and future procurement plans, utilizing information gathered through primary and secondary sources. Forecasting is conducted based on the lifetime of current inventory levels, suitability/need of the weapon category for a specific country, budget availability, and opinion of leading industry experts. The following research methodology is followed for all databases and reports.

Secondary Research

The research process begins with exhaustive secondary research to source reliable qualitative and quantitative information related to the Naval Vessels and Surface Combatants market. The secondary research sources that are typically referred to include, but are not limited to:

- Globally renowned think tanks
- Industry associations
- National government documents and statistical databases
- Company websites, annual reports, financial reports, broker reports, and investor presentations
- Industry trade journals and other literature
- Internal and external proprietary databases
- News articles, press releases, and webcasts specific to the companies operating in the market

Primary Research

SDI conducts hundreds of primary interviews a year with industry participants and commentators in order to validate its data and analysis. A typical research interview fulfils the following functions:

- Provides first-hand information on market size, market trends, growth trends, competitive landscape, and future outlook.
- Helps to validate and strengthen secondary research findings.
- Further develops the analyses team’s expertise and market understanding.

The participants who typically take part in such a process include, but are not limited to:

- Industry participants: CEOs, VPs, business development managers, market intelligence managers, and national sales managers.
- External experts: investment bankers, valuation experts, research analysts, and key opinion leaders specializing in defense markets.
Conventions

- Currency conversions are performed on the basis of average annual conversion rate format calculations.
- All the values in tables, with the exception of compounded annual growth rate (CAGR) and compounded annual rate of change (CARC) are displayed to one decimal place. Growth rates may, therefore, appear inconsistent with absolute values due to this rounding method.

Related Reports

The Global Military Radar Market 2014-2024


The Global Electronic Warfare (EW) Market 2014-2024

The Global Cybersecurity Market 2014-2024
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