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THE INDIAN NAVY – TODAY AND TOMORROW





NAVAL PROJECTION REPORT INDIA BY AMI INTERNATIONAL¹⁾

Global Naval Market: "Top 10" Builders by Tonnage

Top 10 World GDP nominal (2011 rank)

Countries	Total 20 Year Outlook (2012-2031)			% of Region Total		% of World Total	
	New Build Hulls	Tons (FLD)	Average Tons/Hull	# Hulls	Tons (FLD)	# Hulls	Tons (FLD)
U.S. (1)	453	2,441,667	5390	100%	100%	14%	30%
China (2)	172	610,406	3549	16%	26%	5%	7%
Russia (9)	135	605,846	4488	100%	100%	4%	7%
India (11)	213	568,220	2668	20%	24%	7%	7%
U.K. (7)	44	470,350	10,690	8%	24%	1%	6%
Canada (10)	80	305,473	3818	15%	16%	3%	4%
Korea (15)	145	300,628	2073	14%	13%	5%	4%
France (5)	50	236,940	4738	9%	12%	2%	3%
Japan (2)	74	186,800	2524	7%	8%	2%	2%
Turkey (18)	95	172,058	1811	18%	9%	3%	2%
Totals	1461	5,898,388	4037			46%	71%

India is one of the world's leading naval powers. With dramatic expansion and modernization programs underway, India is poised to field new submarines, aircraft carriers, complex surface combatants and modern small fast ships and accompanying aviation and support fleets over the next 20 years. With these new naval investments, India will increasingly be capable of wielding "full spectrum" naval power across the globe.

In the Asia-Pacific region, India and many of its neighboring countries are generating the economic growth needed to expand investment in navies, coast guards and other maritime security agencies. New Indian ship procurements will deliver capabilities to project naval power, support international coalitions, protect territorial seas, offshore resources and sealines of communication, and conduct humanitarian assistance & disaster relief operations.

In terms of projected naval expenditures on new construction platforms, India and China lead the Asia-Pacific region. As shown in the chart below, AMI forecasts that each of the two countries will procure between 170-220 new ships and submarines during the next two decades. Taken together, the two countries represent 35% of all new ships and subs to be built in the A-P region in the next 20 years, and half of the region's new build tonnage. On a global scale, India and China will make up 12% of all new naval hulls to be built worldwide, and almost 15% by of total tonnage of those new naval ships and subs.

India's new aircraft carrier, destroyer, nuclear and conventional submarine, frigate, amphibious and patrol craft construction programs top the region's naval spending list. This naval modernization is unfolding at a sustained and deliberate pace, and the result will be a balanced

portfolio of new ships and submarines to serve India's interests at sea well into the 21st century.

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¹⁾ AMI International is a leading provider of focused market analysis and consulting for naval, maritime security, and unmanned systems markets around the world. AMI tracks naval business opportunities in over 70 countries that consistently invest in naval and maritime security capabilities.

AMI's product line includes naval, missile and unmanned systems market research databases. Its flagship "Hot News" monthly naval market newsletter is considered a "must read" for key players in the industry. AMI maintains an active dialogue with senior sea service leaders, key decision-makers in the naval and defense industry, leading media covering the defense sector, and its network of international advisors and affiliates.

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