2014 Munitions Executive Summit

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Army FMS Across the Globe

FY13 Final

Benefits of Security Assistance
• Strategic Engagements FY13
  - Key Leader Engagements - 220
  - Program Reviews - 175
  - Foreign students trained – 11.2K
  - SA Teams OCONUS - 73 / 40

Total Active FMS
Countries: 145
Cases: 4651
Value: $140.3B
Undelivered: $57B
New FY13: $10.6B
Projected for FY14-16: ~$50B

SATMO
COCOMs: 6
Countries: 40
Teams: 73

NORTHCOM
Countries: 3
Cases: 103
Value: $1.1B

EUCOM
Countries: 42
Cases: 1250
Value: $13B

PACOM
Countries: 22
Cases: 848
Value: $21B

AFRICOM
Countries: 32
Cases: 310
Value: $769.5M

CENTCOM
Countries: 18
Cases: 1735
Value: $101.6B

SOUTHCOM
Countries: 28
Cases: 349
Value: $2.5B

Army FMS FY03-FY13 and out

Total Active FMS $19.7B

Total Active FMS $10.6B

$26B On Offer
Forecast 15% higher ($5B) than Sales

FY13 Forecast $32.9B
FMS $29.1B
Non-FMS $3.8B

FY13 Sales $27.8B
FMS $23.9B
Non-FMS $3.9B

Sales vs Forecast

FY04 FY05 FY06 FY07 FY08 FY09 FY10 FY11 FY12 FY13

$B

F-15 Sale
Saudi Arabia

Non-FMS (BPC): ASFF, ISFF, PCCF, 1206, CRSP

DSCA-STR/PLN, MILDEP RoundTable, 13 Nov 13
Customer base is expanding:
• 17% more countries
• Increasing sales in Mid East, Pacific, Africa

Increasing Competition... and several exploring FMS-like system

Trend toward international competitions... over $25B underway now

Partners expectations are growing:
• Greater speed; better visibility
• Industry partnering
• Co-development
• Tech Transfer

Offset demands are growing... direct and indirect