

# Global Defense Armored Vehicle Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G6A1710A92B8EN.html>

Date: September 2026

Pages: 166

Price: US\$ 4,480.00 (Single User License)

ID: G6A1710A92B8EN

## Abstracts

The global Defense Armored Vehicle market size is expected to reach \$ 31929 million by 2032, rising at a market growth of 5.4% CAGR during the forecast period (2026-2032).

Defense Armored Vehicle is a protected military ground platform developed for combat operations, personnel transport, reconnaissance, patrol, command and control, fire support, medical evacuation, engineering support and other national-defense missions. It combines an armored hull with mobility, weapon, communication and mission systems to protect personnel and critical equipment against ballistic projectiles, artillery fragments, mines, improvised explosive devices and other battlefield threats. Defense armored vehicles may use wheeled or tracked chassis. Wheeled models commonly adopt 4×4, 6×6 or 8×8 configurations and generally emphasize road speed, operational range, rapid deployment and relatively convenient maintenance, while tracked models offer stronger cross-country mobility, higher load-bearing capacity and better adaptability to soft ground, steep terrain and damaged infrastructure. Major products include main battle tanks, infantry fighting vehicles, armored personnel carriers, protected mobility vehicles, mine-resistant vehicles, armored reconnaissance vehicles, command vehicles, direct fire-support vehicles, armored ambulances, engineering vehicles and recovery vehicles.

The principal raw materials used in Defense Armored Vehicle manufacturing include armor-grade steel, high-strength structural steel, aluminum alloys, titanium alloys, ceramic armor, aramid fibers, ultra-high-molecular-weight polyethylene, bullet-resistant glass, rubber, engineering plastics and advanced composite materials. Key components include diesel engines, automatic transmissions, transfer cases, drive axles, tracked running gear, suspension units, road wheels, military tires, braking systems, protected

fuel tanks, cooling systems, batteries, wiring harnesses, cannons, machine guns, missile launchers, remote weapon stations, fire-control systems, thermal imagers, radar, cameras, laser-warning receivers and secure communication equipment. Downstream customers primarily include national defense ministries, armies, marine forces, airborne forces, border-defense units, military police, national guards, special operations forces and peacekeeping contingents. Procurement is commonly conducted through direct government contracts, international tenders, government-to-government agreements, licensed production, local assembly, joint ventures and technology-transfer programs. Customers increasingly assess vehicle protection, mobility, firepower, reliability, system compatibility, crew training, spare-parts availability, maintenance infrastructure and long-term modernization capability as an integrated solution.

In 2025, global Defense Armored Vehicle production reached approximately 12,168 units, with an average market price of around US\$1.768 million per unit.

The Defense Armored Vehicle market is being reshaped by military modernization, replacement of aging vehicle fleets and the evolution of ground-combat threats. Armed forces increasingly require platforms that combine survivability, mobility, firepower, payload capacity, situational awareness and secure network connectivity. Procurement is gradually moving away from isolated vehicle models toward common platform families that can support combat, personnel transport, reconnaissance, command, ambulance, engineering, mortar and recovery configurations. Common chassis, powertrains and electronic architectures improve component standardization, simplify crew training and maintenance, reduce logistical complexity and allow specialized variants to be introduced without establishing entirely separate support systems.

Modularity and digital integration are major product trends. New platforms increasingly adopt modular armor packages, interchangeable mission modules, scalable weapon systems and open electronic architectures. These features allow users to configure the same vehicle for different operational environments and integrate upgraded sensors, communication systems, battlefield-management equipment, electronic-warfare devices and counter-drone technologies. Panoramic cameras, thermal imaging, radar, laser-warning receivers, secure tactical data links and sensor-fusion systems are becoming increasingly important for early threat detection and coordinated operations with infantry, artillery, aircraft and unmanned platforms.

Protection technology remains a central area of investment. Anti-tank guided missiles, top-attack weapons, drones, loitering munitions, mines and improvised explosive devices are increasing demand for active protection systems, reinforced roof armor,

underbody blast protection, energy-absorbing seats, automatic fire suppression, multispectral camouflage and electronic countermeasures. However, additional armor increases vehicle weight and may reduce speed, range, payload capacity and strategic transportability. Manufacturers are therefore expanding the use of high-strength metals, ceramic armor, aramid materials and lightweight composites to improve protection while controlling overall mass.

Powertrain and energy-management technologies are also advancing. More powerful engines and transmissions are required to compensate for increasing vehicle weight and higher onboard electrical loads. Auxiliary power units, high-capacity batteries and hybrid-electric drivetrains can support communication, surveillance, cooling and weapon systems without continuously operating the main engine. Silent-watch capability, reduced thermal and acoustic signatures, driver-assistance systems, vehicle-health monitoring and remote operation are receiving greater attention. Cooperation between crewed armored vehicles, unmanned ground vehicles and aerial drones is also influencing future vehicle configurations and combat concepts.

Europe is an important market for fleet renewal, multinational procurement and expansion of regional defense manufacturing capacity. North America continues to emphasize advanced tracked combat vehicles, protected tactical platforms and modernization of existing fleets, with particular attention to survivability, digital architecture and system integration. Asia-Pacific demand is supported by military modernization, territorial-security requirements and local-production policies, particularly in China, South Korea, India, Japan and Australia. The Middle East focuses on vehicles capable of operating in high-temperature, desert and long-range deployment environments. Other regions generally place greater emphasis on acquisition cost, maintainability, spare-parts availability and suitability for border-defense, counterterrorism and peacekeeping missions.

Market growth is driven by regional security tensions, stronger defense preparedness, replacement of obsolete platforms and increased emphasis on personnel survivability. Expansion of mechanized forces, rapid-deployment units, border-defense operations and peacekeeping missions supports demand for vehicles with different weights and mission configurations. Urban warfare increases requirements for all-round protection, compact vehicle dimensions, high maneuverability, enhanced observation and flexible weapon integration. Local-content policies encourage international manufacturers to establish assembly lines, develop domestic component suppliers, build maintenance centers and transfer selected manufacturing technologies. Further growth drivers include common vehicle families, specialized mission variants, active protection

adoption, counter-drone capability, battlefield digitalization, secure command-and-control connectivity and long-term fleet modernization programs. Long procurement cycles, strict testing requirements, export controls, changing defense budgets, supply-chain constraints and high lifecycle support costs remain major industry challenges.

## Report Scope

This report studies the global Defense Armored Vehicle production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Defense Armored Vehicle and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Defense Armored Vehicle that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Defense Armored Vehicle total production and demand, 2021-2032, (Units)

Global Defense Armored Vehicle total production value, 2021-2032, (USD Million)

Global Defense Armored Vehicle production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Defense Armored Vehicle consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Defense Armored Vehicle domestic production, consumption, key domestic manufacturers and share

Global Defense Armored Vehicle production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Defense Armored Vehicle production by Type, production, value, CAGR,

2021-2032, (USD Million) & (Units)

Global Defense Armored Vehicle production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Defense Armored Vehicle market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include General Dynamics, BAE Systems, Oshkosh Defense, Rheinmetall, China North Industrial, KNDS, Hyundai Rotem, FNSS, Uralvagonzavod, STREIT Group, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Defense Armored Vehicle market

## **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

## **Global Defense Armored Vehicle Market, By Region:**

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## **Market Segmentation**

### **Global Defense Armored Vehicle Market, Segmentation by Type:**

Wheeled Armoured Vehicle

Tracked Armoured Vehicles

### **Global Defense Armored Vehicle Market, Segmentation by Protection Level:**

STANAG 4569 Level 1

STANAG 4569 Level 2

STANAG 4569 Level 3

STANAG 4569 Level 4

STANAG 4569 Level 5 and Above

Other Protection Levels

### **Global Defense Armored Vehicle Market, Segmentation by Primary Mission:**

Main Battle Tanks

Infantry Fighting Vehicles

Armoured Personnel Carriers

Protected Mobility Vehicles

Other Armoured Vehicles

### **Global Defense Armored Vehicle Market, Segmentation by Vehicle Weight:**

Light Armoured Vehicle

Medium Armoured Vehicle

Heavy Armoured Vehicle

### **Global Defense Armored Vehicle Market, Segmentation by Application:**

Combat Operations

Personnel Transport

Reconnaissance & Patrol

Command & Control

Logistics & Support

Medical Evacuation

Others

## **Companies Profiled:**

General Dynamics

BAE Systems

Oshkosh Defense

Rheinmetall

China North Industrial

KNDS

Hyundai Rotem

FNSS

Uralvagonzavod

STREIT Group

Thales Group

Textron

IDV (Leonardo)

ST Engineering

BMC

Otokar

NIMR

Mahindra

Patria

AM General

Arquus (John Cockerill)

Paramount Group

Chongqing Tiema Industries Group

Shaanxi Baoji Special Purpose Vehicle

Dongfeng

## **Key Questions Answered:**

1. How big is the global Defense Armored Vehicle market?
2. What is the demand of the global Defense Armored Vehicle market?
3. What is the year over year growth of the global Defense Armored Vehicle market?
4. What is the production and production value of the global Defense Armored Vehicle market?
5. Who are the key producers in the global Defense Armored Vehicle market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Defense Armored Vehicle Introduction
- 1.2 World Defense Armored Vehicle Supply & Forecast
  - 1.2.1 World Defense Armored Vehicle Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Defense Armored Vehicle Production (2021-2032)
  - 1.2.3 World Defense Armored Vehicle Pricing Trends (2021-2032)
- 1.3 World Defense Armored Vehicle Production by Region (Based on Production Site)
  - 1.3.1 World Defense Armored Vehicle Production Value by Region (2021-2032)
  - 1.3.2 World Defense Armored Vehicle Production by Region (2021-2032)
  - 1.3.3 World Defense Armored Vehicle Average Price by Region (2021-2032)
  - 1.3.4 North America Defense Armored Vehicle Production (2021-2032)
  - 1.3.5 Europe Defense Armored Vehicle Production (2021-2032)
  - 1.3.6 China Defense Armored Vehicle Production (2021-2032)
  - 1.3.7 Japan Defense Armored Vehicle Production (2021-2032)
  - 1.3.8 South Korea Defense Armored Vehicle Production (2021-2032)
  - 1.3.9 India Defense Armored Vehicle Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Defense Armored Vehicle Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Defense Armored Vehicle Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Defense Armored Vehicle Demand (2021-2032)
- 2.2 World Defense Armored Vehicle Consumption by Region
  - 2.2.1 World Defense Armored Vehicle Consumption by Region (2021-2026)
  - 2.2.2 World Defense Armored Vehicle Consumption Forecast by Region (2027-2032)
- 2.3 United States Defense Armored Vehicle Consumption (2021-2032)
- 2.4 China Defense Armored Vehicle Consumption (2021-2032)
- 2.5 Europe Defense Armored Vehicle Consumption (2021-2032)
- 2.6 Japan Defense Armored Vehicle Consumption (2021-2032)
- 2.7 South Korea Defense Armored Vehicle Consumption (2021-2032)
- 2.8 ASEAN Defense Armored Vehicle Consumption (2021-2032)
- 2.9 India Defense Armored Vehicle Consumption (2021-2032)

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Defense Armored Vehicle Production Value by Manufacturer (2021-2026)
- 3.2 World Defense Armored Vehicle Production by Manufacturer (2021-2026)
- 3.3 World Defense Armored Vehicle Average Price by Manufacturer (2021-2026)
- 3.4 Defense Armored Vehicle Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global Defense Armored Vehicle Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for Defense Armored Vehicle in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for Defense Armored Vehicle in 2025
- 3.6 Defense Armored Vehicle Market: Overall Company Footprint Analysis
  - 3.6.1 Defense Armored Vehicle Market: Region Footprint
  - 3.6.2 Defense Armored Vehicle Market: Company Product Type Footprint
  - 3.6.3 Defense Armored Vehicle Market: Company Product Application Footprint
- 3.7 Competitive Environment
  - 3.7.1 Historical Structure of the Industry
  - 3.7.2 Barriers of Market Entry
  - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

## **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

- 4.1 United States VS China: Defense Armored Vehicle Production Value Comparison
  - 4.1.1 United States VS China: Defense Armored Vehicle Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: Defense Armored Vehicle Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Defense Armored Vehicle Production Comparison
  - 4.2.1 United States VS China: Defense Armored Vehicle Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: Defense Armored Vehicle Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Defense Armored Vehicle Consumption Comparison
  - 4.3.1 United States VS China: Defense Armored Vehicle Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: Defense Armored Vehicle Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Defense Armored Vehicle Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Defense Armored Vehicle Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Defense Armored Vehicle Production Value (2021-2026)

4.4.3 United States Based Manufacturers Defense Armored Vehicle Production (2021-2026)

4.5 China Based Defense Armored Vehicle Manufacturers and Market Share

4.5.1 China Based Defense Armored Vehicle Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Defense Armored Vehicle Production Value (2021-2026)

4.5.3 China Based Manufacturers Defense Armored Vehicle Production (2021-2026)

4.6 Rest of World Based Defense Armored Vehicle Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Defense Armored Vehicle Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Defense Armored Vehicle Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Defense Armored Vehicle Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World Defense Armored Vehicle Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Wheeled Armoured Vehicle

5.2.2 Tracked Armoured Vehicles

5.3 Market Segment by Type

5.3.1 World Defense Armored Vehicle Production by Type (2021-2032)

5.3.2 World Defense Armored Vehicle Production Value by Type (2021-2032)

5.3.3 World Defense Armored Vehicle Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY PROTECTION LEVEL**

6.1 World Defense Armored Vehicle Market Size Overview by Protection Level: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Protection Level

6.2.1 STANAG 4569 Level 1

- 6.2.2 STANAG 4569 Level 2
- 6.2.3 STANAG 4569 Level 3
- 6.2.4 STANAG 4569 Level 4
- 6.2.5 STANAG 4569 Level 5 and Above
- 6.2.6 Other Protection Levels
- 6.3 Market Segment by Protection Level
  - 6.3.1 World Defense Armored Vehicle Production by Protection Level (2021-2032)
  - 6.3.2 World Defense Armored Vehicle Production Value by Protection Level (2021-2032)
  - 6.3.3 World Defense Armored Vehicle Average Price by Protection Level (2021-2032)

## **7 MARKET ANALYSIS BY PRIMARY MISSION**

- 7.1 World Defense Armored Vehicle Market Size Overview by Primary Mission: 2021 VS 2025 VS 2032
- 7.2 Segment Introduction by Primary Mission
  - 7.2.1 Main Battle Tanks
  - 7.2.2 Infantry Fighting Vehicles
  - 7.2.3 Armoured Personnel Carriers
  - 7.2.4 Protected Mobility Vehicles
  - 7.2.5 Other Armoured Vehicles
- 7.3 Market Segment by Primary Mission
  - 7.3.1 World Defense Armored Vehicle Production by Primary Mission (2021-2032)
  - 7.3.2 World Defense Armored Vehicle Production Value by Primary Mission (2021-2032)
  - 7.3.3 World Defense Armored Vehicle Average Price by Primary Mission (2021-2032)

## **8 MARKET ANALYSIS BY VEHICLE WEIGHT**

- 8.1 World Defense Armored Vehicle Market Size Overview by Vehicle Weight: 2021 VS 2025 VS 2032
- 8.2 Segment Introduction by Vehicle Weight
  - 8.2.1 Light Armoured Vehicle
  - 8.2.2 Medium Armoured Vehicle
  - 8.2.3 Heavy Armoured Vehicle
- 8.3 Market Segment by Vehicle Weight
  - 8.3.1 World Defense Armored Vehicle Production by Vehicle Weight (2021-2032)
  - 8.3.2 World Defense Armored Vehicle Production Value by Vehicle Weight (2021-2032)

### 8.3.3 World Defense Armored Vehicle Average Price by Vehicle Weight (2021-2032)

## 9 MARKET ANALYSIS BY APPLICATION

### 9.1 World Defense Armored Vehicle Market Size Overview by Application: 2021 VS 2025 VS 2032

### 9.2 Segment Introduction by Application

#### 9.2.1 Combat Operations

#### 9.2.2 Personnel Transport

#### 9.2.3 Reconnaissance & Patrol

#### 9.2.4 Command & Control

#### 9.2.5 Logistics & Support

#### 9.2.6 Medical Evacuation

#### 9.2.7 Others

### 9.3 Market Segment by Application

#### 9.3.1 World Defense Armored Vehicle Production by Application (2021-2032)

#### 9.3.2 World Defense Armored Vehicle Production Value by Application (2021-2032)

#### 9.3.3 World Defense Armored Vehicle Average Price by Application (2021-2032)

## 10 COMPANY PROFILES

### 10.1 General Dynamics

#### 10.1.1 General Dynamics Details

#### 10.1.2 General Dynamics Major Business

#### 10.1.3 General Dynamics Defense Armored Vehicle Product and Services

#### 10.1.4 General Dynamics Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 10.1.5 General Dynamics Recent Developments/Updates

#### 10.1.6 General Dynamics Competitive Strengths & Weaknesses

### 10.2 BAE Systems

#### 10.2.1 BAE Systems Details

#### 10.2.2 BAE Systems Major Business

#### 10.2.3 BAE Systems Defense Armored Vehicle Product and Services

#### 10.2.4 BAE Systems Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 10.2.5 BAE Systems Recent Developments/Updates

#### 10.2.6 BAE Systems Competitive Strengths & Weaknesses

### 10.3 Oshkosh Defense

#### 10.3.1 Oshkosh Defense Details

- 10.3.2 Oshkosh Defense Major Business
- 10.3.3 Oshkosh Defense Defense Armored Vehicle Product and Services
- 10.3.4 Oshkosh Defense Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.3.5 Oshkosh Defense Recent Developments/Updates
- 10.3.6 Oshkosh Defense Competitive Strengths & Weaknesses
- 10.4 Rheinmetall
  - 10.4.1 Rheinmetall Details
  - 10.4.2 Rheinmetall Major Business
  - 10.4.3 Rheinmetall Defense Armored Vehicle Product and Services
  - 10.4.4 Rheinmetall Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.4.5 Rheinmetall Recent Developments/Updates
  - 10.4.6 Rheinmetall Competitive Strengths & Weaknesses
- 10.5 China North Industrial
  - 10.5.1 China North Industrial Details
  - 10.5.2 China North Industrial Major Business
  - 10.5.3 China North Industrial Defense Armored Vehicle Product and Services
  - 10.5.4 China North Industrial Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.5.5 China North Industrial Recent Developments/Updates
  - 10.5.6 China North Industrial Competitive Strengths & Weaknesses
- 10.6 KNDS
  - 10.6.1 KNDS Details
  - 10.6.2 KNDS Major Business
  - 10.6.3 KNDS Defense Armored Vehicle Product and Services
  - 10.6.4 KNDS Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.6.5 KNDS Recent Developments/Updates
  - 10.6.6 KNDS Competitive Strengths & Weaknesses
- 10.7 Hyundai Rotem
  - 10.7.1 Hyundai Rotem Details
  - 10.7.2 Hyundai Rotem Major Business
  - 10.7.3 Hyundai Rotem Defense Armored Vehicle Product and Services
  - 10.7.4 Hyundai Rotem Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.7.5 Hyundai Rotem Recent Developments/Updates
  - 10.7.6 Hyundai Rotem Competitive Strengths & Weaknesses
- 10.8 FNSS

- 10.8.1 FNSS Details
- 10.8.2 FNSS Major Business
- 10.8.3 FNSS Defense Armored Vehicle Product and Services
- 10.8.4 FNSS Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.8.5 FNSS Recent Developments/Updates
- 10.8.6 FNSS Competitive Strengths & Weaknesses
- 10.9 Uralvagonzavod
  - 10.9.1 Uralvagonzavod Details
  - 10.9.2 Uralvagonzavod Major Business
  - 10.9.3 Uralvagonzavod Defense Armored Vehicle Product and Services
  - 10.9.4 Uralvagonzavod Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.9.5 Uralvagonzavod Recent Developments/Updates
  - 10.9.6 Uralvagonzavod Competitive Strengths & Weaknesses
- 10.10 STREIT Group
  - 10.10.1 STREIT Group Details
  - 10.10.2 STREIT Group Major Business
  - 10.10.3 STREIT Group Defense Armored Vehicle Product and Services
  - 10.10.4 STREIT Group Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.10.5 STREIT Group Recent Developments/Updates
  - 10.10.6 STREIT Group Competitive Strengths & Weaknesses
- 10.11 Thales Group
  - 10.11.1 Thales Group Details
  - 10.11.2 Thales Group Major Business
  - 10.11.3 Thales Group Defense Armored Vehicle Product and Services
  - 10.11.4 Thales Group Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.11.5 Thales Group Recent Developments/Updates
  - 10.11.6 Thales Group Competitive Strengths & Weaknesses
- 10.12 Textron
  - 10.12.1 Textron Details
  - 10.12.2 Textron Major Business
  - 10.12.3 Textron Defense Armored Vehicle Product and Services
  - 10.12.4 Textron Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.12.5 Textron Recent Developments/Updates
  - 10.12.6 Textron Competitive Strengths & Weaknesses

### 10.13 IDV (Leonardo)

#### 10.13.1 IDV (Leonardo) Details

#### 10.13.2 IDV (Leonardo) Major Business

#### 10.13.3 IDV (Leonardo) Defense Armored Vehicle Product and Services

#### 10.13.4 IDV (Leonardo) Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 10.13.5 IDV (Leonardo) Recent Developments/Updates

#### 10.13.6 IDV (Leonardo) Competitive Strengths & Weaknesses

### 10.14 ST Engineering

#### 10.14.1 ST Engineering Details

#### 10.14.2 ST Engineering Major Business

#### 10.14.3 ST Engineering Defense Armored Vehicle Product and Services

#### 10.14.4 ST Engineering Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 10.14.5 ST Engineering Recent Developments/Updates

#### 10.14.6 ST Engineering Competitive Strengths & Weaknesses

### 10.15 BMC

#### 10.15.1 BMC Details

#### 10.15.2 BMC Major Business

#### 10.15.3 BMC Defense Armored Vehicle Product and Services

#### 10.15.4 BMC Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 10.15.5 BMC Recent Developments/Updates

#### 10.15.6 BMC Competitive Strengths & Weaknesses

### 10.16 Otokar

#### 10.16.1 Otokar Details

#### 10.16.2 Otokar Major Business

#### 10.16.3 Otokar Defense Armored Vehicle Product and Services

#### 10.16.4 Otokar Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 10.16.5 Otokar Recent Developments/Updates

#### 10.16.6 Otokar Competitive Strengths & Weaknesses

### 10.17 NIMR

#### 10.17.1 NIMR Details

#### 10.17.2 NIMR Major Business

#### 10.17.3 NIMR Defense Armored Vehicle Product and Services

#### 10.17.4 NIMR Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 10.17.5 NIMR Recent Developments/Updates

- 10.17.6 NIMR Competitive Strengths & Weaknesses
- 10.18 Mahindra
  - 10.18.1 Mahindra Details
  - 10.18.2 Mahindra Major Business
  - 10.18.3 Mahindra Defense Armored Vehicle Product and Services
  - 10.18.4 Mahindra Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.18.5 Mahindra Recent Developments/Updates
  - 10.18.6 Mahindra Competitive Strengths & Weaknesses
- 10.19 Patria
  - 10.19.1 Patria Details
  - 10.19.2 Patria Major Business
  - 10.19.3 Patria Defense Armored Vehicle Product and Services
  - 10.19.4 Patria Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.19.5 Patria Recent Developments/Updates
  - 10.19.6 Patria Competitive Strengths & Weaknesses
- 10.20 AM General
  - 10.20.1 AM General Details
  - 10.20.2 AM General Major Business
  - 10.20.3 AM General Defense Armored Vehicle Product and Services
  - 10.20.4 AM General Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.20.5 AM General Recent Developments/Updates
  - 10.20.6 AM General Competitive Strengths & Weaknesses
- 10.21 Arquus (John Cockerill)
  - 10.21.1 Arquus (John Cockerill) Details
  - 10.21.2 Arquus (John Cockerill) Major Business
  - 10.21.3 Arquus (John Cockerill) Defense Armored Vehicle Product and Services
  - 10.21.4 Arquus (John Cockerill) Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.21.5 Arquus (John Cockerill) Recent Developments/Updates
  - 10.21.6 Arquus (John Cockerill) Competitive Strengths & Weaknesses
- 10.22 Paramount Group
  - 10.22.1 Paramount Group Details
  - 10.22.2 Paramount Group Major Business
  - 10.22.3 Paramount Group Defense Armored Vehicle Product and Services
  - 10.22.4 Paramount Group Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 10.22.5 Paramount Group Recent Developments/Updates
- 10.22.6 Paramount Group Competitive Strengths & Weaknesses
- 10.23 Chongqing Tiema Industries Group
  - 10.23.1 Chongqing Tiema Industries Group Details
  - 10.23.2 Chongqing Tiema Industries Group Major Business
  - 10.23.3 Chongqing Tiema Industries Group Defense Armored Vehicle Product and Services
  - 10.23.4 Chongqing Tiema Industries Group Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.23.5 Chongqing Tiema Industries Group Recent Developments/Updates
  - 10.23.6 Chongqing Tiema Industries Group Competitive Strengths & Weaknesses
- 10.24 Shaanxi Baoji Special Purpose Vehicle
  - 10.24.1 Shaanxi Baoji Special Purpose Vehicle Details
  - 10.24.2 Shaanxi Baoji Special Purpose Vehicle Major Business
  - 10.24.3 Shaanxi Baoji Special Purpose Vehicle Defense Armored Vehicle Product and Services
  - 10.24.4 Shaanxi Baoji Special Purpose Vehicle Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.24.5 Shaanxi Baoji Special Purpose Vehicle Recent Developments/Updates
  - 10.24.6 Shaanxi Baoji Special Purpose Vehicle Competitive Strengths & Weaknesses
- 10.25 Dongfeng
  - 10.25.1 Dongfeng Details
  - 10.25.2 Dongfeng Major Business
  - 10.25.3 Dongfeng Defense Armored Vehicle Product and Services
  - 10.25.4 Dongfeng Defense Armored Vehicle Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.25.5 Dongfeng Recent Developments/Updates
  - 10.25.6 Dongfeng Competitive Strengths & Weaknesses

## **11 INDUSTRY CHAIN ANALYSIS**

- 11.1 Defense Armored Vehicle Industry Chain
- 11.2 Defense Armored Vehicle Upstream Analysis
  - 11.2.1 Defense Armored Vehicle Core Raw Materials
  - 11.2.2 Main Manufacturers of Defense Armored Vehicle Core Raw Materials
- 11.3 Midstream Analysis
- 11.4 Downstream Analysis
- 11.5 Defense Armored Vehicle Production Mode
- 11.6 Defense Armored Vehicle Procurement Model

## 11.7 Defense Armored Vehicle Industry Sales Model and Sales Channels

### 11.7.1 Defense Armored Vehicle Sales Model

### 11.7.2 Defense Armored Vehicle Typical Distributors

## 12 RESEARCH FINDINGS AND CONCLUSION

## 13 APPENDIX

### 13.1 Methodology

### 13.2 Research Process and Data Source

### 13.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World Defense Armored Vehicle Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Defense Armored Vehicle Production Value by Region (2021-2026) & (USD Million)

Table 3. World Defense Armored Vehicle Production Value by Region (2027-2032) & (USD Million)

Table 4. World Defense Armored Vehicle Production Value Market Share by Region (2021-2026)

Table 5. World Defense Armored Vehicle Production Value Market Share by Region (2027-2032)

Table 6. World Defense Armored Vehicle Production by Region (2021-2026) & (Units)

Table 7. World Defense Armored Vehicle Production by Region (2027-2032) & (Units)

Table 8. World Defense Armored Vehicle Production Market Share by Region (2021-2026)

Table 9. World Defense Armored Vehicle Production Market Share by Region (2027-2032)

Table 10. World Defense Armored Vehicle Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Defense Armored Vehicle Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Defense Armored Vehicle Major Market Trends

Table 13. World Defense Armored Vehicle Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Defense Armored Vehicle Consumption by Region (2021-2026) & (Units)

Table 15. World Defense Armored Vehicle Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Defense Armored Vehicle Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Defense Armored Vehicle Producers in 2025

Table 18. World Defense Armored Vehicle Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Defense Armored Vehicle Producers in 2025

Table 20. World Defense Armored Vehicle Average Price by Manufacturer (2021-2026)

& (US\$/Unit)

Table 21. Global Defense Armored Vehicle Company Evaluation Quadrant

Table 22. World Defense Armored Vehicle Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Defense Armored Vehicle Production Site of Key Manufacturer

Table 24. Defense Armored Vehicle Market: Company Product Type Footprint

Table 25. Defense Armored Vehicle Market: Company Product Application Footprint

Table 26. Defense Armored Vehicle Competitive Factors

Table 27. Defense Armored Vehicle New Entrant and Capacity Expansion Plans

Table 28. Defense Armored Vehicle Mergers & Acquisitions Activity

Table 29. United States VS China Defense Armored Vehicle Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Defense Armored Vehicle Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Defense Armored Vehicle Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Defense Armored Vehicle Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Defense Armored Vehicle Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Defense Armored Vehicle Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Defense Armored Vehicle Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Defense Armored Vehicle Production Market Share (2021-2026)

Table 37. China Based Defense Armored Vehicle Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Defense Armored Vehicle Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Defense Armored Vehicle Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Defense Armored Vehicle Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Defense Armored Vehicle Production Market Share (2021-2026)

Table 42. Rest of World Based Defense Armored Vehicle Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Defense Armored Vehicle Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Defense Armored Vehicle Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Defense Armored Vehicle Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Defense Armored Vehicle Production Market Share (2021-2026)

Table 47. World Defense Armored Vehicle Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Defense Armored Vehicle Production by Type (2021-2026) & (Units)

Table 49. World Defense Armored Vehicle Production by Type (2027-2032) & (Units)

Table 50. World Defense Armored Vehicle Production Value by Type (2021-2026) & (USD Million)

Table 51. World Defense Armored Vehicle Production Value by Type (2027-2032) & (USD Million)

Table 52. World Defense Armored Vehicle Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Defense Armored Vehicle Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Defense Armored Vehicle Production Value by Protection Level, (USD Million), 2021 & 2025 & 2032

Table 55. World Defense Armored Vehicle Production by Protection Level (2021-2026) & (Units)

Table 56. World Defense Armored Vehicle Production by Protection Level (2027-2032) & (Units)

Table 57. World Defense Armored Vehicle Production Value by Protection Level (2021-2026) & (USD Million)

Table 58. World Defense Armored Vehicle Production Value by Protection Level (2027-2032) & (USD Million)

Table 59. World Defense Armored Vehicle Average Price by Protection Level (2021-2026) & (US\$/Unit)

Table 60. World Defense Armored Vehicle Average Price by Protection Level (2027-2032) & (US\$/Unit)

Table 61. World Defense Armored Vehicle Production Value by Primary Mission, (USD Million), 2021 & 2025 & 2032

Table 62. World Defense Armored Vehicle Production by Primary Mission (2021-2026) & (Units)

Table 63. World Defense Armored Vehicle Production by Primary Mission (2027-2032)

& (Units)

Table 64. World Defense Armored Vehicle Production Value by Primary Mission (2021-2026) & (USD Million)

Table 65. World Defense Armored Vehicle Production Value by Primary Mission (2027-2032) & (USD Million)

Table 66. World Defense Armored Vehicle Average Price by Primary Mission (2021-2026) & (US\$/Unit)

Table 67. World Defense Armored Vehicle Average Price by Primary Mission (2027-2032) & (US\$/Unit)

Table 68. World Defense Armored Vehicle Production Value by Vehicle Weight, (USD Million), 2021 & 2025 & 2032

Table 69. World Defense Armored Vehicle Production by Vehicle Weight (2021-2026) & (Units)

Table 70. World Defense Armored Vehicle Production by Vehicle Weight (2027-2032) & (Units)

Table 71. World Defense Armored Vehicle Production Value by Vehicle Weight (2021-2026) & (USD Million)

Table 72. World Defense Armored Vehicle Production Value by Vehicle Weight (2027-2032) & (USD Million)

Table 73. World Defense Armored Vehicle Average Price by Vehicle Weight (2021-2026) & (US\$/Unit)

Table 74. World Defense Armored Vehicle Average Price by Vehicle Weight (2027-2032) & (US\$/Unit)

Table 75. World Defense Armored Vehicle Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World Defense Armored Vehicle Production by Application (2021-2026) & (Units)

Table 77. World Defense Armored Vehicle Production by Application (2027-2032) & (Units)

Table 78. World Defense Armored Vehicle Production Value by Application (2021-2026) & (USD Million)

Table 79. World Defense Armored Vehicle Production Value by Application (2027-2032) & (USD Million)

Table 80. World Defense Armored Vehicle Average Price by Application (2021-2026) & (US\$/Unit)

Table 81. World Defense Armored Vehicle Average Price by Application (2027-2032) & (US\$/Unit)

Table 82. General Dynamics Basic Information, Manufacturing Base and Competitors

Table 83. General Dynamics Major Business

Table 84. General Dynamics Defense Armored Vehicle Product and Services

Table 85. General Dynamics Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. General Dynamics Recent Developments/Updates

Table 87. General Dynamics Competitive Strengths & Weaknesses

Table 88. BAE Systems Basic Information, Manufacturing Base and Competitors

Table 89. BAE Systems Major Business

Table 90. BAE Systems Defense Armored Vehicle Product and Services

Table 91. BAE Systems Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. BAE Systems Recent Developments/Updates

Table 93. BAE Systems Competitive Strengths & Weaknesses

Table 94. Oshkosh Defense Basic Information, Manufacturing Base and Competitors

Table 95. Oshkosh Defense Major Business

Table 96. Oshkosh Defense Defense Armored Vehicle Product and Services

Table 97. Oshkosh Defense Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. Oshkosh Defense Recent Developments/Updates

Table 99. Oshkosh Defense Competitive Strengths & Weaknesses

Table 100. Rheinmetall Basic Information, Manufacturing Base and Competitors

Table 101. Rheinmetall Major Business

Table 102. Rheinmetall Defense Armored Vehicle Product and Services

Table 103. Rheinmetall Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Rheinmetall Recent Developments/Updates

Table 105. Rheinmetall Competitive Strengths & Weaknesses

Table 106. China North Industrial Basic Information, Manufacturing Base and Competitors

Table 107. China North Industrial Major Business

Table 108. China North Industrial Defense Armored Vehicle Product and Services

Table 109. China North Industrial Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. China North Industrial Recent Developments/Updates

Table 111. China North Industrial Competitive Strengths & Weaknesses

Table 112. KNDS Basic Information, Manufacturing Base and Competitors

Table 113. KNDS Major Business

|                                                                                                                                                                    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Table 114. KNDS Defense Armored Vehicle Product and Services                                                                                                       |
| Table 115. KNDS Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)           |
| Table 116. KNDS Recent Developments/Updates                                                                                                                        |
| Table 117. KNDS Competitive Strengths & Weaknesses                                                                                                                 |
| Table 118. Hyundai Rotem Basic Information, Manufacturing Base and Competitors                                                                                     |
| Table 119. Hyundai Rotem Major Business                                                                                                                            |
| Table 120. Hyundai Rotem Defense Armored Vehicle Product and Services                                                                                              |
| Table 121. Hyundai Rotem Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)  |
| Table 122. Hyundai Rotem Recent Developments/Updates                                                                                                               |
| Table 123. Hyundai Rotem Competitive Strengths & Weaknesses                                                                                                        |
| Table 124. FNSS Basic Information, Manufacturing Base and Competitors                                                                                              |
| Table 125. FNSS Major Business                                                                                                                                     |
| Table 126. FNSS Defense Armored Vehicle Product and Services                                                                                                       |
| Table 127. FNSS Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)           |
| Table 128. FNSS Recent Developments/Updates                                                                                                                        |
| Table 129. FNSS Competitive Strengths & Weaknesses                                                                                                                 |
| Table 130. Uralvagonzavod Basic Information, Manufacturing Base and Competitors                                                                                    |
| Table 131. Uralvagonzavod Major Business                                                                                                                           |
| Table 132. Uralvagonzavod Defense Armored Vehicle Product and Services                                                                                             |
| Table 133. Uralvagonzavod Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026) |
| Table 134. Uralvagonzavod Recent Developments/Updates                                                                                                              |
| Table 135. Uralvagonzavod Competitive Strengths & Weaknesses                                                                                                       |
| Table 136. STREIT Group Basic Information, Manufacturing Base and Competitors                                                                                      |
| Table 137. STREIT Group Major Business                                                                                                                             |
| Table 138. STREIT Group Defense Armored Vehicle Product and Services                                                                                               |
| Table 139. STREIT Group Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)   |
| Table 140. STREIT Group Recent Developments/Updates                                                                                                                |
| Table 141. STREIT Group Competitive Strengths & Weaknesses                                                                                                         |
| Table 142. Thales Group Basic Information, Manufacturing Base and Competitors                                                                                      |
| Table 143. Thales Group Major Business                                                                                                                             |
| Table 144. Thales Group Defense Armored Vehicle Product and Services                                                                                               |

Table 145. Thales Group Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Thales Group Recent Developments/Updates

Table 147. Thales Group Competitive Strengths & Weaknesses

Table 148. Textron Basic Information, Manufacturing Base and Competitors

Table 149. Textron Major Business

Table 150. Textron Defense Armored Vehicle Product and Services

Table 151. Textron Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. Textron Recent Developments/Updates

Table 153. Textron Competitive Strengths & Weaknesses

Table 154. IDV (Leonardo) Basic Information, Manufacturing Base and Competitors

Table 155. IDV (Leonardo) Major Business

Table 156. IDV (Leonardo) Defense Armored Vehicle Product and Services

Table 157. IDV (Leonardo) Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. IDV (Leonardo) Recent Developments/Updates

Table 159. IDV (Leonardo) Competitive Strengths & Weaknesses

Table 160. ST Engineering Basic Information, Manufacturing Base and Competitors

Table 161. ST Engineering Major Business

Table 162. ST Engineering Defense Armored Vehicle Product and Services

Table 163. ST Engineering Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. ST Engineering Recent Developments/Updates

Table 165. ST Engineering Competitive Strengths & Weaknesses

Table 166. BMC Basic Information, Manufacturing Base and Competitors

Table 167. BMC Major Business

Table 168. BMC Defense Armored Vehicle Product and Services

Table 169. BMC Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. BMC Recent Developments/Updates

Table 171. BMC Competitive Strengths & Weaknesses

Table 172. Otokar Basic Information, Manufacturing Base and Competitors

Table 173. Otokar Major Business

Table 174. Otokar Defense Armored Vehicle Product and Services

Table 175. Otokar Defense Armored Vehicle Production (Units), Price (US\$/Unit),

Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 176. Otokar Recent Developments/Updates

Table 177. Otokar Competitive Strengths & Weaknesses

Table 178. NIMR Basic Information, Manufacturing Base and Competitors

Table 179. NIMR Major Business

Table 180. NIMR Defense Armored Vehicle Product and Services

Table 181. NIMR Defense Armored Vehicle Production (Units), Price (US\$/Unit),  
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 182. NIMR Recent Developments/Updates

Table 183. NIMR Competitive Strengths & Weaknesses

Table 184. Mahindra Basic Information, Manufacturing Base and Competitors

Table 185. Mahindra Major Business

Table 186. Mahindra Defense Armored Vehicle Product and Services

Table 187. Mahindra Defense Armored Vehicle Production (Units), Price (US\$/Unit),  
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 188. Mahindra Recent Developments/Updates

Table 189. Mahindra Competitive Strengths & Weaknesses

Table 190. Patria Basic Information, Manufacturing Base and Competitors

Table 191. Patria Major Business

Table 192. Patria Defense Armored Vehicle Product and Services

Table 193. Patria Defense Armored Vehicle Production (Units), Price (US\$/Unit),  
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 194. Patria Recent Developments/Updates

Table 195. Patria Competitive Strengths & Weaknesses

Table 196. AM General Basic Information, Manufacturing Base and Competitors

Table 197. AM General Major Business

Table 198. AM General Defense Armored Vehicle Product and Services

Table 199. AM General Defense Armored Vehicle Production (Units), Price (US\$/Unit),  
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 200. AM General Recent Developments/Updates

Table 201. AM General Competitive Strengths & Weaknesses

Table 202. Arquus (John Cockerill) Basic Information, Manufacturing Base and  
Competitors

Table 203. Arquus (John Cockerill) Major Business

Table 204. Arquus (John Cockerill) Defense Armored Vehicle Product and Services

Table 205. Arquus (John Cockerill) Defense Armored Vehicle Production (Units), Price  
(US\$/Unit), Production Value (USD Million), Gross Margin and Market Share  
(2021-2026)

Table 206. Arquus (John Cockerill) Recent Developments/Updates

|                                                                                                                                                                                           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Table 207. Arquus (John Cockerill) Competitive Strengths & Weaknesses                                                                                                                     |
| Table 208. Paramount Group Basic Information, Manufacturing Base and Competitors                                                                                                          |
| Table 209. Paramount Group Major Business                                                                                                                                                 |
| Table 210. Paramount Group Defense Armored Vehicle Product and Services                                                                                                                   |
| Table 211. Paramount Group Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)                       |
| Table 212. Paramount Group Recent Developments/Updates                                                                                                                                    |
| Table 213. Paramount Group Competitive Strengths & Weaknesses                                                                                                                             |
| Table 214. Chongqing Tiema Industries Group Basic Information, Manufacturing Base and Competitors                                                                                         |
| Table 215. Chongqing Tiema Industries Group Major Business                                                                                                                                |
| Table 216. Chongqing Tiema Industries Group Defense Armored Vehicle Product and Services                                                                                                  |
| Table 217. Chongqing Tiema Industries Group Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)      |
| Table 218. Chongqing Tiema Industries Group Recent Developments/Updates                                                                                                                   |
| Table 219. Chongqing Tiema Industries Group Competitive Strengths & Weaknesses                                                                                                            |
| Table 220. Shaanxi Baoji Special Purpose Vehicle Basic Information, Manufacturing Base and Competitors                                                                                    |
| Table 221. Shaanxi Baoji Special Purpose Vehicle Major Business                                                                                                                           |
| Table 222. Shaanxi Baoji Special Purpose Vehicle Defense Armored Vehicle Product and Services                                                                                             |
| Table 223. Shaanxi Baoji Special Purpose Vehicle Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026) |
| Table 224. Shaanxi Baoji Special Purpose Vehicle Recent Developments/Updates                                                                                                              |
| Table 225. Shaanxi Baoji Special Purpose Vehicle Competitive Strengths & Weaknesses                                                                                                       |
| Table 226. Dongfeng Basic Information, Manufacturing Base and Competitors                                                                                                                 |
| Table 227. Dongfeng Major Business                                                                                                                                                        |
| Table 228. Dongfeng Defense Armored Vehicle Product and Services                                                                                                                          |
| Table 229. Dongfeng Defense Armored Vehicle Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)                              |
| Table 230. Dongfeng Recent Developments/Updates                                                                                                                                           |
| Table 231. Dongfeng Competitive Strengths & Weaknesses                                                                                                                                    |
| Table 232. Global Key Players of Defense Armored Vehicle Upstream (Raw Materials)                                                                                                         |
| Table 233. Global Defense Armored Vehicle Typical Customers                                                                                                                               |

Table 234. Defense Armored Vehicle Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Defense Armored Vehicle Picture

Figure 2. World Defense Armored Vehicle Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Defense Armored Vehicle Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Defense Armored Vehicle Production (2021-2032) & (Units)

Figure 5. World Defense Armored Vehicle Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Defense Armored Vehicle Production Value Market Share by Region (2021-2032)

Figure 7. World Defense Armored Vehicle Production Market Share by Region (2021-2032)

Figure 8. North America Defense Armored Vehicle Production (2021-2032) & (Units)

Figure 9. Europe Defense Armored Vehicle Production (2021-2032) & (Units)

Figure 10. China Defense Armored Vehicle Production (2021-2032) & (Units)

Figure 11. Japan Defense Armored Vehicle Production (2021-2032) & (Units)

Figure 12. South Korea Defense Armored Vehicle Production (2021-2032) & (Units)

Figure 13. India Defense Armored Vehicle Production (2021-2032) & (Units)

Figure 14. Defense Armored Vehicle Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World Defense Armored Vehicle Consumption (2021-2032) & (Units)

Figure 17. World Defense Armored Vehicle Consumption Market Share by Region (2021-2032)

Figure 18. United States Defense Armored Vehicle Consumption (2021-2032) & (Units)

Figure 19. China Defense Armored Vehicle Consumption (2021-2032) & (Units)

Figure 20. Europe Defense Armored Vehicle Consumption (2021-2032) & (Units)

Figure 21. Japan Defense Armored Vehicle Consumption (2021-2032) & (Units)

Figure 22. South Korea Defense Armored Vehicle Consumption (2021-2032) & (Units)

Figure 23. ASEAN Defense Armored Vehicle Consumption (2021-2032) & (Units)

Figure 24. India Defense Armored Vehicle Consumption (2021-2032) & (Units)

Figure 25. Producer Shipments of Defense Armored Vehicle by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for Defense Armored Vehicle Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for Defense Armored Vehicle Markets in 2025

Figure 28. United States VS China: Defense Armored Vehicle Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Defense Armored Vehicle Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Defense Armored Vehicle Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers Defense Armored Vehicle Production Market Share 2025

Figure 32. China Based Manufacturers Defense Armored Vehicle Production Market Share 2025

Figure 33. Rest of World Based Manufacturers Defense Armored Vehicle Production Market Share 2025

Figure 34. World Defense Armored Vehicle Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 35. World Defense Armored Vehicle Production Value Market Share by Type in 2025

Figure 36. Wheeled Armoured Vehicle

Figure 37. Tracked Armoured Vehicles

Figure 38. World Defense Armored Vehicle Production Market Share by Type (2021-2032)

Figure 39. World Defense Armored Vehicle Production Value Market Share by Type (2021-2032)

Figure 40. World Defense Armored Vehicle Average Price by Type (2021-2032) & (US\$/Unit)

Figure 41. World Defense Armored Vehicle Production Value by Protection Level, (USD Million), 2021 & 2025 & 2032

Figure 42. World Defense Armored Vehicle Production Value Market Share by Protection Level in 2025

Figure 43. STANAG 4569 Level 1

Figure 44. STANAG 4569 Level 2

Figure 45. STANAG 4569 Level 3

Figure 46. STANAG 4569 Level 4

Figure 47. STANAG 4569 Level 5 and Above

Figure 48. Other Protection Levels

Figure 49. World Defense Armored Vehicle Production Market Share by Protection Level (2021-2032)

Figure 50. World Defense Armored Vehicle Production Value Market Share by Protection Level (2021-2032)

Figure 51. World Defense Armored Vehicle Average Price by Protection Level

(2021-2032) & (US\$/Unit)

Figure 52. World Defense Armored Vehicle Production Value by Primary Mission, (USD Million), 2021 & 2025 & 2032

Figure 53. World Defense Armored Vehicle Production Value Market Share by Primary Mission in 2025

Figure 54. Main Battle Tanks

Figure 55. Infantry Fighting Vehicles

Figure 56. Armoured Personnel Carriers

Figure 57. Protected Mobility Vehicles

Figure 58. Other Armoured Vehicles

Figure 59. World Defense Armored Vehicle Production Market Share by Primary Mission (2021-2032)

Figure 60. World Defense Armored Vehicle Production Value Market Share by Primary Mission (2021-2032)

Figure 61. World Defense Armored Vehicle Average Price by Primary Mission (2021-2032) & (US\$/Unit)

Figure 62. World Defense Armored Vehicle Production Value by Vehicle Weight, (USD Million), 2021 & 2025 & 2032

Figure 63. World Defense Armored Vehicle Production Value Market Share by Vehicle Weight in 2025

Figure 64. Light Armoured Vehicle

Figure 65. Medium Armoured Vehicle

Figure 66. Heavy Armoured Vehicle

Figure 67. World Defense Armored Vehicle Production Market Share by Vehicle Weight (2021-2032)

Figure 68. World Defense Armored Vehicle Production Value Market Share by Vehicle Weight (2021-2032)

Figure 69. World Defense Armored Vehicle Average Price by Vehicle Weight (2021-2032) & (US\$/Unit)

Figure 70. World Defense Armored Vehicle Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 71. World Defense Armored Vehicle Production Value Market Share by Application in 2025

Figure 72. Combat Operations

Figure 73. Personnel Transport

Figure 74. Reconnaissance & Patrol

Figure 75. Command & Control

Figure 76. Logistics & Support

Figure 77. Medical Evacuation

Figure 78. Others

Figure 79. World Defense Armored Vehicle Production Market Share by Application (2021-2032)

Figure 80. World Defense Armored Vehicle Production Value Market Share by Application (2021-2032)

Figure 81. World Defense Armored Vehicle Average Price by Application (2021-2032) & (US\$/Unit)

Figure 82. Defense Armored Vehicle Industry Chain

Figure 83. Defense Armored Vehicle Procurement Model

Figure 84. Defense Armored Vehicle Sales Model

Figure 85. Defense Armored Vehicle Sales Channels, Direct Sales, and Distribution

Figure 86. Methodology

Figure 87. Research Process and Data Source

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