

Military Vehicle Electrification Market by Platform (Combat Vehicles, Support Vehicles, Unmanned Armored Vehicles), System, Technology (Hybrid, Fully Electric), Mode of operation, Voltage Type and Region - Global Forecast to 2030

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Abstracts

The Military Vehicle Electrification market is estimated to be USD 4.1 billion in 2023 and is projected to reach USD 20.4 billion by 2030, at a CAGR of 25.6 % from 2023 to 2030. The military vehicle electrification market is being propelled by several key drivers, reflecting a shift towards advanced technologies and sustainable practices. Firstly, the imperative for enhanced operational efficiency and reduced logistical burden drives military forces worldwide to embrace electrification. Electric vehicles offer improved energy efficiency and lower maintenance costs, contributing to streamlined logistics and increased operational range. Secondly, the growing concern for environmental sustainability and the need to reduce carbon emissions align with the global trend towards electrification. Military organizations are increasingly recognizing the benefits of electric propulsion systems in mitigating their environmental impact, meeting regulatory standards, and showcasing commitment to eco-friendly practices.

"Power Generation": The Second Largest segment by system during the forecast period." Based on System, the military vehicle electrification market has been segmented into Power generation, Cooling System, Energy Storage, Traction Drive Systems/ Propulsion System, Power conversion, Transmission System. The Power Generation Segment is expected to acquire the second largest market share during the forecast period. The power generation segment is expected to experience significant growth in the military vehicle electrification market due to a combination of technological advancements, operational advantages, and strategic imperatives.

The integration of electric power generation systems in military vehicles enhances their overall efficiency and flexibility. These systems often include advanced generators and energy storage solutions, enabling vehicles to produce and store electricity on board. This capability facilitates a more agile and responsive deployment of power to various mission-critical systems and equipment, ultimately enhancing the operational capabilities of military vehicles.

”Command and Control vehicles”: The fastest growing segment by support vehicles during the forecast period.” The Command and Control (C2) Vehicles segment is anticipated to experience growth in the military vehicle electrification market for several reasons. Firstly, C2 vehicles are critical components of modern military operations, serving as mobile command centers that facilitate communication, coordination, and decision-making. Electrifying these vehicles offers distinct advantages, such as reduced noise, increased stealth, and enhanced mobility, which are essential for effective command and control in diverse operational environments.

Secondly, electric C2 vehicles contribute to improved operational efficiency and flexibility. Electric propulsion systems enable quick acceleration, deceleration, and precise maneuvering, allowing for rapid deployment and repositioning on the battlefield. Additionally, the reduced maintenance requirements of electric drivetrains contribute to increased vehicle availability, ensuring that C2 vehicles are ready for deployment when needed.

”Ammunition Replenishment Vehicle”: The fastest growing segment by supply trucks during the forecast period.”

The ammunition replenishment vehicle segment is estimated to experience growth in the military vehicle electrification market for several reasons. Firstly, electrifying ammunition replenishment vehicles aligns with the broader trend of adopting electric propulsion systems in military logistics to enhance operational efficiency and reduce dependence on traditional fuel sources. Electric vehicles in this segment offer lower operating costs, reduced maintenance requirements, and increased reliability, contributing to more effective ammunition resupply operations.

Secondly, the need for agility and rapid response in modern warfare scenarios necessitates innovative solutions in logistics. Electric ammunition replenishment vehicles can provide quicker acceleration, improved maneuverability, and enhanced speed compared to traditional vehicles, allowing for faster and more efficient ammunition delivery to frontline units.

“US to account for the highest market share in the military vehicle electrification market in the forecasted year.”

The United States is poised to dominate the military vehicle electrification market due to a confluence of strategic, technological, and economic factors. Firstly, the U.S. possesses a robust and technologically advanced defense sector that continually invests in innovation. The country's military establishments prioritize the adoption of cutting-edge technologies, including electrification, to enhance operational efficiency and reduce environmental impact. Secondly, the U.S. has a thriving electric vehicle industry, benefitting from a well-established ecosystem of research institutions, manufacturers, and suppliers. This domestic expertise provides the military with a solid foundation for incorporating electric propulsion systems into their vehicles, ensuring reliable and scalable solutions.

Break-up of profiles of primary participants in the hypersonic flight market: By Company Type: Tier 1 – 35%, Tier 2 – 45%, and Tier 3 – 20% By Designation: C-Level Executives – 35%, Director level – 25%, and Others – 40% By Region: North America – 25%, Europe – 15%, Asia Pacific – 40%, Middle East-15%, Rest of the world – 15%

Prominent companies in the military vehicle electrification market are Oshkosh Corporation (US), GM Defense LLC (US), General Dynamics Corporation(US),BAE Systems (UK), Leonardo S.p.A. (Italy), among others.

Research Coverage: The market study covers the military vehicle electrification market across segments. It aims to estimate the market size and the growth potential of this market across different segments, such as system, platform, technology, mode of operation, voltage type, and region. The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies. Key benefits of buying this report: This report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall military vehicle electrification market and its subsegments. The report covers the entire ecosystem of the military vehicle electrification industry and will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report will also help stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Advanced modern battlefield requirements , Rising demand for electric power sources for military vehicles, Increasing development of autonomous and unmanned military vehicle, Growing defense expenditures worldwide) Restraints (Need for balanced power-to-weight ratio, Limited range of military electric vehicles, High cost of fuel cell electric vehicles) Opportunities (Growing demand for hydrogen fuel cell systems) and challenges (Lifecycle and durability issues of integrated systems, Lack of standardized charging protocols) that impact the growth of the military vehicle electrification market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the military vehicle electrification market.

Market Development: Comprehensive information about lucrative markets – the report analyses the military vehicle electrification market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the military vehicle electrification market.

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Oshkosh Corporation (US), GM Defense LLC (US), General Dynamics Corporation(US),BAE Systems (UK), Leonardo S.p.A. (Italy), among others in the military vehicle electrification market.

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*Details on Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.

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