

# **Annual Industry Dossier - Global Armored Vehicle Industry - 2013-2014 - Key Trends, Issues & Challenges, SWOT, Force Field Analysis & Strategic Outlook**

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## **Abstracts**

Armored vehicles have traditionally been a key component of the force structure of land forces globally and have played a strategic role in almost all major campaigns of the last & the twenty first century with their capabilities. The recent allied war against terror saw the development & emergence of specific vehicles built to counter the threat from IEDs across Iraq & Afghanistan theatres enhanced troop protection level , especially, MRAPs & counter IED vehicles, like Buffalo, aimed at neutralizing the increasing threat from a range of asymmetric threats which further showcased the capabilities & effectiveness of armor against insurgency bound operations on very difficult terrains under adverse fighting conditions across hostile & distant war theatres.

The allied operations across Iraq & Afghanistan war theatres over the first decade of the twenty first century drove the growth of defense industrial base across North America & Europe and significantly bolstered businesses, especially, armored vehicle manufacturers. The industry segment saw the entry of new players like Navistar into the defense segment, witnessed the growth of niche players like Force Protection and observed the significant expansion of order backlog at industry heavyweights, especially, GDLS & BAE Systems. However, with the winding up of allied operations and the scheduled withdrawal of troops from Afghanistan through 2014 and the commensurate defense spending cuts; the activity across almost all key OEMs has dropped substantially and the competitive intensity for new contracts has risen tremendously with cost competitiveness becoming a critical parameter for contract awards as witnessed over the U.S. Army's earlier FMTV program & the recent JLTV program.

The defense spending situation across traditional markets is likely to further tighten over near to medium term. In the United States alone, a 45% cut in defense spending on tactical wheeled vehicles is anticipated through the 2013 to 2017 period as per the President's latest budget request. The European conditions are not good either with the French annual defense spending too, projected to stay flat at €31.4 billion through 2014-2019 under the military budget law with a cumulative funding deficit of about €5.9 billion through 2019 expected to be plugged through strategic asset sales with about €1.8 billion required to be generated in 2014 & 2015 itself through expected stake sales in DCNS & Dassault. The industry, consequently, has been on the consolidation path and has already seen the acquisition of Force Protection by GDLS and the merger of Panhard & Renault Truck Defense. Further, the French Government is now pushing for a partnership amongst Nexter and Krauss-Maffei Wegmann for cost competitiveness under difficult budgetary conditions.

Most OEMs are working towards implementing an array of strategies and strategic plans aimed at partially offsetting the ongoing spending cuts revolving around key demand drivers, namely, replacement demand, vehicle upgrades & retrofitment, maintenance & repair, demand from emerging nations and technological developments offering superior maneuverability and enhanced troop protection against a broad range of asymmetric threats. Further, the OEMs are also working towards rationalizing & optimizing their overall cost base & industrial footprint with competitiveness becoming critical while continuing with their strong R&D focus directed at the development of cutting edge technologies & platforms with enhanced capabilities & superior performance features & specifications. The reduced activity level has also led to OEMs forming strategic alliances to reduce risks, share developmental costs & foray into international markets.

Against this backdrop, the report analyzes the Global armored vehicle industry and provides strategic insights into the key industry trends, challenges & risk factors that are likely to shape the future of the industry followed by an insightful industry SWOT & Force Field Analysis and strategic outlook for the industry for 2014.

### **Excerpts/Highlights from the report:**

1. International Exports besides Potential, Latent Opportunities in Sustainment Support & Platform Upgrade to be especially Significant for all Key Global OEMs, in terms, of Sustainability as a Measure to Partially Offset ongoing spate of Defense Spending Cuts.
2. Analysis of strategic developments over the upcoming procurement programs across

traditional markets which are likely to be crucial for the industry amid the prevailing industry environment, namely:

JLTV (Joint Light Tactical Vehicle)

GMV (Ground Mobility Vehicle)

Ground Combat Vehicle (GCV)

ACV (Amphibious Combat Vehicle)

AMPV (Armored Multi-Purpose Vehicle)

ARV (Armored Reconnaissance Vehicle)

Latest string of CV-90 procurements in Western Europe

3. Analysis of the Growing Magnitude of Threat from IEDs with near-term Innovations likely to enhance IED effectiveness & the analysis of trajectory of potential IED Threat Progression over the 2015-2020 time horizon. Likely advent of Lighter Vehicle Platforms offering similar level of troop protection over near to medium term as MRAPs & their Commensurate Impact on the Global Defense Land Vehicle Industry.

4. Analysis of Growing Industry Risks for Overcapacity across Traditional Markets, especially, Europe where defense budgets are under severe pressure due to Euro-zone debt crisis and potential industry implications of the same.

5. Analysis of Key Technological Trends, Innovations & Developments Likely to Shape the Future of the Industry

### **Usage & Relevance:**

The report provides & will be useful for:

Strategic Analysis and Vital Inputs essential for Strategic Planning & Decision-Making Process

Analysis of inherent Industry Strengths & Weaknesses

Identification & Analysis of Imminent Opportunities & Emerging Potential Threats

Gaining access to Key Industry Trends & Insights; crucial inputs for Decision-Makers

Analysis of Forces Driving and Restraining the Industry & their overall Dynamics

Identifying & highlighting areas for making Potential Strategic Changes, Adjustments and

Realignment of the internal strategy framework in-sync with emergent trends

Strategic Industry Outlook for 2014

**For Whom:**

The report would be essential for those having strategic interest in the Global Armored Vehicle Industry/Global defense industry & will be especially useful for key decision makers, top management of companies, suppliers, vendors, current & potential investors, industry & company analysts & those associated with the industry.

**Highlight:**

The report is comprehensive yet concise & compact at the same time; built on the Microsoft PowerPoint platform; thus, rendering it custom-built for meetings & presentations while enabling & ensuring prompt and informed decision making as a ready self-reckoner.

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