

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

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## **Abstracts**

The allied operations & campaigns across Iraq & Afghanistan war theatres under Operation Iraqi Freedom and Operation Enduring Freedom post 9/11 drove the growth of defense industrial base across North America and especially bolstered growth of armored vehicle manufacturers given the significant utilization & threat from IEDs & other asymmetric tactics across these theatres throughout these campaigns. The industry segment saw the entry of new players like Navistar into the armoured vehicle segment through these years, 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 North American OEMs has dropped substantially, topline across OEMs has shrunk by almost one third to half as compared against peak defense spending levels while the competitive intensity for new defense contracts award has risen tremendously with cost competitiveness becoming a critical parameter for new contract awards.

The defense spending situation across North America 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 with the situation likely to further worsen with the sequestration cuts coming into effect from March 2013. The industry, consequently, has been on the consolidation path and has already seen the acquisition of Force Protection by GDLS. Further, strategic alliances & collaboration trend amongst OEMs is on the rise

aimed at sharing development costs as well as risks & enhanced cost competitiveness amid a difficult budgetary scenario.

Further, the U.S. Army faces significant overcapacity, in terms, of its inventory of tactical wheeled vehicles, especially, with the return of 20,000 MRAPs from Iraq & Afghanistan theatres coupled with lack of clarity over their future role & deployment protocol. The advent of the JLTV platform to replace U.S. Army's existing fleet of HMMWVs, too, is likely to alter the industry dynamics tremendously with the estimated size of procurement pegged at about 55,000 units.

Most North American OEMs are working towards implementing an array of strategies and plans aimed at partially offsetting the ongoing spending cuts through a shift in focus towards key demand drivers, namely, replacement demand, vehicle upgrades & retrofitment, maintenance & repair, demand from international markets, especially, emerging markets & regions and technological developments offering superior manoeuvrability, enhanced degree of troop protection and survivability 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 offering enhanced capabilities & superior performance features as well as specifications.

Against this backdrop, the report analyzes the North American 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. Analysis of the realignment of strategic focus across key industry players.
2. 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.
3. Analysis of Growing Industry Risks for Overcapacity across Traditional Markets

4. 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)

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 North American 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.

## Contents

### **SECTION - 1**

North American Armored Vehicle Industry - Key Industry Trends

### **SECTION - 2**

Key Industry Issues, Challenges & Potential Risk Factors

### **SECTION - 3**

North American Armored Vehicle Industry - SWOT Analysis

Strengths to Leverage on

Weaknesses to Improve Upon & Offset

Opportunities to Capitalize on

Threats to Counter Mitigate, Negate & Overcome

### **SECTION - 4**

Force Field Analysis - North American Armored Vehicle Industry

Driving Forces

Restraining Forces

### **SECTION - 5**

Strategic Industry Outlook for 2014

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