

# **Annual Strategy Dossier - 2013-2014 - North America's 7 Leading Armored Vehicle Manufacturers - Key Strategies, Plans, SWOT, Trends & Strategic Outlook - General Dynamics Land Systems, BAE Systems, Oshkosh Corporation, Navistar Defense, Lockheed Martin, Textron Systems, AM General**

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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 armoured 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.

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, looks into & provides strategic insights into the key strategies & plans crafted & being pursued by these 7 key, leading North American armoured vehicle manufacturing companies to navigate their way through the present macro-environmental uncertainty & difficult global economic conditions with the world economy still treading cautiously on the recovery path.

### **Key Strategies & Plans included in the Report for each OEM:**

1. Product Portfolio Strategies & Plans
2. Market Specific & Regional Strategies & Plans
3. R&D Strategies & Plans
4. Growth Strategies & Plans
5. Business and Corporate Strategies & Plans
6. Production/Manufacturing Strategies & Plans

### **Key Excerpts/Findings from the Report:**

1. Analysis of Oshkosh's Technological/Value Innovation Driven New Product Development Strategy besides focus on strategic product portfolio expansion & strengthening focus on pursuit of international export opportunities.
2. Analysis of GDLS's overall strategy revolving around Expansion of Product Portfolio

with the Development of New Vehicle Variants, Platforms & Cutting-Edge Technologies focusing on Reduction of Overall Operating & Sustainment Costs and Enhanced Tactical Effectiveness.

3. Analysis of BAE System's Strategic Plans for Protecting & Preserving Current Program Positions across its Traditional Markets, Expansion of Services Portfolio as well as Capabilities & Plans to Expand Share of Revenues Originating from International Markets.

4. 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.

5. 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.

6. Analysis of Growing Industry Risks for Overcapacity across Traditional Markets

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

### **Relevance & Usefulness: The report will be useful for**

Strategic Planning, Competitive Analysis & Benchmarking Exercise

Comprehensive Strategic & Competitive Assessment & Analysis for each key OEM

Strategic Insights into key Business Strategies & Plans being pursued by each company

Analysis of key Strategic Initiatives & Developments besides a Comprehensive SWOT Analysis for each Industry Player

Gaining a Strategic Perspective on the Business & Strategic Outlook for all key players for 2013-2014

Gaining access to Key Industry as well as Market Trends, Insights & Growth Opportunities

Analysis of Forces Driving as well as restraining the Industry & their overall

Dynamics through a Force Field Analysis

Identifying & highlighting areas for Potential Strategic Changes, Adjustments & Realignment

**For Whom:**

This strategic report would be essential for those having strategic interest in the Global/North American Armoured Vehicle Industry or Global Defense industry or any of these companies as a perfect complement to & in combination with existing market research reports on the global or regional armoured vehicle industry. The report will be especially useful for Key Decision-Makers, Top Management of Companies, OEMs, Suppliers, Distributors, Vendors and other Key Players in the Industry Value Chain as well as existing & potential Investors, industry & company analysts & those associated with the industry or any of these companies.

**Highlight:**

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations, being built on the Microsoft PowerPoint platform; in addition, to being a ready self-reckoner as well as a quick reference guide driving, enabling & ensuring prompt and informed decision making.

**Companies included in the Report:**

General Dynamics Land Systems

BAE Systems – Land & Armaments

Oshkosh Corporation

Navistar Defense

Textron Systems

Lockheed Martin Corporation

AM General LLC



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