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Annual Strategy Dossier - 2013 - World's 10 Leading Wheeled Armoured Vehicle Manufacturers - Key Strategies, Plans, Trends, Force Field Analysis & Strategic Outlook - General Dynamics Land Systems, BAE Systems, Oshkosh Corporation, Navistar Defense, Thales, Rheinmetall Defence, Nexter Systems, Iveco Defense Vehicles, Renault Defense Trucks, Textron Systems

https://marketpublishers.com/r/A7C1A791599EN.html
Date: June 2013
Pages: 90
Price: US$ 1,657.00 (Single User License)
ID: A7C1A791599EN

Abstracts

Armoured 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 specialized vehicles, especially, MRAPs & mine detection vehicles, like Buffalo, aimed at neutralizing the increasing threat from a range of asymmetric threats, especially, IEDs, which further showcased the capabilities & effectiveness of armour 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, armoured vehicle manufacturers. The industry segment saw the entry of new players like Navistar into the armoured vehicle 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

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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 JLTV & FMTV programs.

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 manoeuvrability and enhanced 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, looks into & provides strategic insights into the key strategies & plans crafted & being pursued by these 10 key, leading armoured vehicle manufacturing companies to navigate their way through the present macro-environmental uncertainty & difficult global economic conditions.

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

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

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 for each Industry Player

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

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:

The report would be essential for those having strategic interest in the Global Armoured Vehicle Industry or Global Defense industry or any of these companies & 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

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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

Rheinmetall Defence

Nexter Systems

Textron Systems

Iveco Defense Vehicles S.p.A.

Thales SA

Renault Truck Defense

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Contents

SECTION - 5

Global Armoured Vehicle Industry - Force Field Analysis
  Driving Forces
  Restraining Forces

SECTION - 6

Key Industry Trends
Key Issues & Challenges
Risk Factors
Industry Outlook for 2013

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