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# Comparative SWOT & Strategy Focus - 2016-2020 - Europe's 5 Leading Armored Vehicle Manufacturers - BAE Systems plc, GDELS, Rheinmetall, KMW Nexter Defense Systems, Iveco Defense

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## Abstracts

Europe has a special & deep relationship with Armor with the continent being its traditional birthplace & hotbed of technologies which spearheaded the development, fielding & first utilization of armor for combat in World War I which followed rapid further developments & subsequent extensive utilization in the World War II. Armor’s role in providing mobility, troop protection and lethal firepower was further underscored & demonstrated effectively across the Iraq & Afghanistan war theatres during the allied war operations, which were the first major military operations of the 21st century and witnessed a generational change in threat landscape underscored by the extensive utilization of IEDs, RPGs & ATGMs while combating asymmetric warfare tactics with battlefield boundaries being nebulous at best and non-existent at the worst. This evolution of threat landscape with growing & serious threat to armor survivability from a range of threats has questioned the very raison d’etre of previous generation light & medium armor in the current, completely altered threat landscape, thus, rendering many of the existing platforms incapable of operating effectively and obsolete, thus, spurring replacement demand ageing vehicle platforms across most key markets globally. Additionally, strategic changes in, as well as, evolution of the traditional world order & geo-political dynamics marked by the resurgence of Russia with the impressive build-up & showcasing of military capabilities across Ukraine & Syria, continued political instability & regional conflict in the Middle East and the emergence of China as a key regional economic and military power in the Asia-Pacific region have already become key drivers of defense spending across most parts of the world.

The European scenario is no different with the traditional armor stronghold facing a

hectic pace of activities with the looming, credulous Russian threat backed by third generation armor as well as related technological advances and increasing Russian activities in Eastern Europe & the Baltics having already driven a significant increase in defense spending across a number of states based in Northern as well as Central Europe, in addition, to the Baltics with a significant focus & emphasis being placed on land forces and armor given the geographic location and proximity of these states to Russia. A number of large, big ticket defense modernization & replacement programs have already been initiated, announced or are in the pipeline stage across a number of European states aimed at replacement of ageing, cold war legacy armor, led by the U.K., France, Poland & a number of other European states. Impending upgrades to traditional heavyweight armor centerpieces, including the Challenger 2 & Leclerc MBTs, too, which had been impending for a long time, are also on the anvil and about to be rolled out now along with a number of new IFV & APC procurement programs being initiated. The numbers are likely to go up further over near to medium term with the NATO's defense spending mandate compliance likely to become a key point of contention.

The European & Global outlook for armored vehicles over medium term, thus, is bright & promising with the presence of a number of long term demand & growth drivers in the form of ageing existing hardware, strong external threat perception amid evolving geo-political dynamics and availability of next generation technologies, most notably the introduction of third generation MBTs, driving manifold increase in capabilities, mobility, protection and firepower. These strategic factors have collectively driven & are likely to continue to drive significant investments towards land systems with the initiation of a number of new, active as well as planned procurement programs for armored vehicle across most traditional & emerging markets. All key European industry OEMs are pursuing upcoming defense programs across most key traditional & growth markets aggressively looking to drive business growth over near to medium term while leveraging existing product platforms & technologies intelligently besides continuing to pursue R&D activity for the development of next generation technologies.

Against this backdrop, the report maps out as to how the key industry OEMs are currently positioned and are likely to fit into as well as emerge over near to medium term amid a rapidly evolving market scenario as the industry gears up for demand resurgence after a long hiatus marked by the initiation of a number of new asset recapitalization & modernization programs across a number of European nations. The scope of analysis includes a Comprehensive & Insightful Comparative SWOT framework Analysis and analysis of the Near to Medium Term Strategy Focus for the Europe's 5 Leading Armored Vehicle manufacturers. The framework analyzes the

Strengths & Weaknesses of the OEMs from a standalone as well as relative perspective based on a comprehensive analysis of their Key, Strategic Aspects, which include:

Product Portfolio Analysis & its Strategic Positioning across Key Markets & Segments

Breadth & Depth of Presence across Key Geographic Markets & Regions

Analysis of overall Cost Base, Structure & its Management

Analysis of Revenue streams, Resource Base & Key Competencies

Profitability, Key Profit Sources, Growth & Trend Analysis

Capital & Ownership Structure, Financial Strength

Key Competitor Analysis across Market Segments & Degree of Competitive Intensity

Competitive Market Positioning across Key Global Markets & Market Share

Overall Strategy Orientation & Focus, R&D Strategy, Technological Strength & Capabilities

The framework subsequently analyzes & identifies potentially significant, niche growth opportunities & avenues and imminent as well as emerging threats for each key industry OEM based on their strategic product portfolio & market positioning, core strengths & weaknesses and overall strategy focus & orientation against the backdrop of emerging market dynamics & trends. The report analyzes the overall degree of strategic responsiveness of OEMs to external environmental factors, which include, prevailing industry dynamics & emerging industry trends, issues, challenges & potential risk factors to assess their ability to be able to derive further business growth by capitalizing on potential growth opportunities effectively while negating threats simultaneously over near to medium term.

Relevance & Usefulness: The report will be useful for

Inputs for Strategic Planning, Competitive Assessment & Decision-Making

Processes

Analysis of Core Strengths & Weaknesses for each of the 5 Key European Industry Players

Analysis of Near-term Strategy Focus and Insights into Key Strategies & Plans for the industry OEMs

Identification of & Insights into Potential Growth Opportunities & Avenues

Analysis of Key & Emerging Market & Technology Trends

Analysis of Key Issues, Challenges & Potential Risk Factors

Identifying & highlighting areas for making potential Strategic Changes, Adjustments & Realignment

Contingency planning for current Strategies & Programs

Analysis of Forces Driving as well as restraining the Industry & their Overall Dynamics

Strategic Perspective on the likely Evolution of the European and Global Armored Vehicle Market over Medium Term

Near to Medium Term Market Outlook, Inputs on Market Evolution & Demand Growth Projections

For Whom:-

The report is essential & a must have for Government, Military & Senior Industry Personnel and all those with strategic interest & stakes in the European/Global Armored Vehicles Market. The report will be extremely useful for Key Decision-Makers, Program Managers, Global Procurement Managers, Defense Contracting Executives & Departments, Top Management of Industry Players & Other Companies, Industry OEMs, Suppliers, Vendors, MRO Services Providers, Associated Equipment Manufacturers and other Key Players in the Industry Value Chain. The report will also be useful for existing & potential Investors, Industry & Company Analysts, M&A

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## Contents

**SECTION – 3**

SWOT Analysis – For each of the 5 Key Industry OEMs
Strengths to be Leveraged
Weaknesses to be worked on
Opportunities to be capitalized upon
Threats to be negated & mitigated

**SECTION – 4**

Comparative Analysis of Strengths
BAE Systems plc
General Dynamics European Land Systems (GDELS)
Rheinmetall Defence
KMW Nexter Defense Systems (KNDS)
Iveco Defense

**SECTION – 5**

Comparative Analysis of Weaknesses
BAE Systems plc
General Dynamics European Land Systems (GDELS)
Rheinmetall Defence
KMW Nexter Defense Systems (KNDS)
Iveco Defense

**SECTION – 6**

Strategy Focus across OEMs – Near to Medium Term - 5 Leading Industry OEMs
BAE Systems plc
General Dynamics European Land Systems (GDELS)
Rheinmetall Defence
KMW Nexter Defense Systems (KNDS)
Iveco Defense

**SECTION – 7**

Analysis of Key Strategies & Plans for the Industry OEMs
Analysis Coverage:

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Product Portfolio Strategies & Plans
Market Specific Strategies & Plans
R&D Strategies & Plans
Growth Strategies & Plans
Business and Corporate Strategies & Plans
Sales & Marketing Strategies & Plans
Production/Manufacturing Strategies & Plans
Financial Strategies & Plans
Acquisitions, Strategic Alliances & JVs
Other Strategies & Strategic Initiatives

**SECTION - 8**

Global Armored Vehicles Market - Force Field Analysis - Analysis of Driving & Restraining Forces and their Overall Dynamics
Driving Forces
Restraining Forces

**SECTION – 9**

Key Market & Technology Trends

**SECTION – 10**

Key Issues, Challenges & Risk Factors

**SECTION – 11**

Strategic Market Outlook – 2016  2025
Analysis of Emerging Market Scenario
Demand Growth Outlook & Projections for Armored Vehicles
Insights into Potential Growth Opportunities

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