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Comparative SWOT & Strategy Focus - 2017-2021- Europe's Top 5 Armored Vehicle Manufacturers - BAE Systems, GDELS, Rheinmetall, KNDS, Iveco Defense

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Abstracts

The armored vehicles market segment in Europe has witnessed a sort of renaissance as of late driven by a combination of strong external threat perception, development of next generation technologies by the industry, political unanimity on defense priorities and economic improvements with the decent GDP growth in the EU over the past year or so. The earlier annexation of Crimea by Russia in 2014 followed up by increase in hostilities over the recent years and the recent joint Russian-Belarus Zapad military exercises have taken the threat perception from Russia to a new zenith, especially, across Northern, Eastern & Central European regions, given their geographical proximity & location. The same has already driven a spike in defense spending across almost the entire Europe with focus on both modernization as well as replacement of ageing, in-service armored vehicle fleets. The rapid evolution of threat landscape with the extensive & indiscriminate utilization of IEDs, RPGs and ATGMs by non-state actors across battlefields along with the commensurate evolution of capabilities through the development of next generation technologies, focused on the triad of protection, firepower & mobility, have altered the in- theatre dynamics completely, thus, rendering old armor platforms antiquated and the hardware modernization & replacement decisions necessary & logical.

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. Impending upgrades to traditional heavyweight armor centerpieces, like the Challenger 2 & Leclerc MBTs, too, have been kick-started along with a number of new IFV & APC procurement & modernization programs as of late. The numbers are likely to go up further over near to medium term with the NATO’s defense spending mandate compliance also likely to

become a key point of contention. France has already announced a 5% year on year increase in defense spending translating into EUR 1.8 Billion for 2018 as part of the country’s efforts to reach the NATO spending mandate (2% of GDP) by 2025.

The European OEMs are working towards leveraging their existing vehicle platforms as well as industrial base across the continent effectively aiming to be a part of upcoming modernization & new vehicle acquisition programs being initiated by almost all key nations across Europe in a highly competitive industry environment given the multitude of armored vehicle platforms operated by the EU member states unlike the U.S. The OEMs also continue to work towards development of cutting edge technological innovations, especially, advanced protection & sight systems, electric powertrains leveraging recent advancements in Li-Ion battery technology, directed energy weapons and increase in firepower through the integration of more powerful guns. Additionally, significant changes in the traditional world order & geo-political dynamics, continued political instability & regional conflict in the Middle East and rapidly evolving balance of power equation in the Asia-Pacific (with China and North Korea's military capabilities) have already become key drivers of defense spending across most parts of the world, thereby, providing significant opportunities for the European industry OEMs.

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 market dynamics & emerging 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

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 Advisory Firms, Strategy & Management Consulting Firms, PE Firms, Venture Capitalists, Financing & Leasing Companies, Researchers and all those associated with the industry/sector.

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