

# **Europe's 5 Leading Armored Vehicle Manufacturers - Strategic Focus & Priorities, Key Strategies & Plans, SWOT Analysis, Trends & Growth Opportunities, Market Outlook - 2016-2020 - GDELS, BAE Systems plc, 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 significant change in threat landscape underscored by rapid & extensive utilization of IEDs, RPGs & ATGMs while combating asymmetric warfare with battlefield boundaries being nebulous at best and non-existent at the worst. This evolution of threat landscape drove the development of a new class of vehicles, i.e. MRAPs, which have proved to be an effective response to a serious threat from IEDs, RPGs and ATGMs to armor survivability; which collectively have questioned the very raison d'être of previous generation light & medium armor in a completely altered threat landscape. This pivotal alteration in threat landscape has thus been the key driver of replacement demand for the ageing armored vehicles fleet globally dating back to the cold war era. 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. Long time impending upgrades to traditional heavyweight armor centerpieces like the Challenger 2 & Leclerc MBTs, too, are being 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 geopolitical 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.

Against this backdrop, this unique report analyzes the key strategies, plans and overall strategy focus across key European industry OEMs who are gearing 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 as well as other traditional & emerging markets as of late. 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. The report

also maps out how the industry OEMs are preparing & likely to fit into a changing & evolving market landscape in the years ahead.

### **Report Excerpts:**

Analysis of BAE Systems' Strategies & Plans aimed at making further inroads into the European & U.S. Armored Vehicles Markets.

Analysis of GDELS' Growth Plans for the Global Armored Vehicles Market pivoting around Core Platforms & Technologies

Analysis of Rheinmetall's Growth Plans Focused on Long Term Franchise Programs, International Exports and Development of Next Generation Products & Technologies

IFVs, APCs & MBTs to lead Demand Growth over Medium Term

Australia, India & Saudi Arabia to be Key Growth Markets for the Industry OEMs over Medium Term

Analysis of Mobile HEL Effectors, Evolution of Active Protection Systems (APS), Hypervelocity Projectiles & Other Emerging Technologies as well as Products

### **Relevance & Usefulness:**

Strategic Planning, Assessment & Decision-Making Processes

Analysis of Near to Medium Term Strategy Focus and Key Strategies & Plans for all industry OEMs

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

Identification of & Insights into Potential Growth Opportunities & Avenues

Analysis of Key Armored Vehicle Programs across Markets & Regions

Development of Custom, Market-specific Strategies aligned with Potential

Growth Opportunities

Formulation, Development & Shaping of Business Growth Strategies

Conceptualization, Development & Shaping of Product Platform Specific Strategies

Adjustment & Alignment of Overall Strategy Focus and Resource Allocation for OEMs & Key Industry Players across Value Chain

### **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.

Features, Benefits & Reasons to Procure:

The report is unique and one of the most thorough resources on European OEM strategies and the Global Armored Vehicles market featuring a combination of quantitative and lucid qualitative analysis enriched significantly by visual representation & overall presentation style and thus will be a significant value-add for industry professionals looking for the competitive edge.

Provides Macro View and Big Picture Quickly

Blend of Quantitative & Qualitative Analysis

Significant Time Savings

Visual Representation

Meetings & Presentation Ready Format

Superior & Enriched User Experience with Incorporation of Relevant Images

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BAE Systems plc

General Dynamics European Land Systems (GDELS)  
Rheinmetall AG  
KMW Nexter Defense Systems  
Iveco Defense

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