

Europe's Top 5 Armored Vehicle Manufacturers - Annual Strategy Dossier - 2019 - BAE Systems, GDELS, Rheinmetall, KNDS, Iveco Defense

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Abstracts

The European defense industrial base has been on a renaissance of sorts over the recent years driven by the radical transformation of geopolitical dynamics and equations with the dismantling of traditional rule based world order and the transition away from the typical unipolar world, which had prevailed since the end of Cold war. The same has been further exacerbated by the Trump led U.S. administration's squandering of the traditional global leadership role under the "America First" policy which has led to realignment of relationships with the key NATO & other allies with the mandate to increase defense spending to the 2% level of GDP. The defense spending across most parts of the world has been on a steady upswing over the past couple of years and is likely to maintain that course over near term. Further, the resurgence of Russia as a key regional power over the years and the emphatic display of its capabilities across Crimea & Syria theatres and the development of cutting edge, next generation weapon systems has provided enough incentives & created a sense of urgency amongst most European states to review and update their defense capabilities.

The U.K.'s exit from the EU, too, has accelerated as well as catalyzed defense & security cooperation amongst the remaining EU member states with the initiation of joint development programs, most noticeably, the Franco-German Future Combat Air System (FCAS) project entailing the development of a common next generation fighter jet program. Coming to the land systems domain, the contemplation of a joint Franco-German Main Ground Combat System (MGCS) to replace the existing German Leopard 2 and French Leclerc Main Battle Tanks (MBTs) is in the offing, being led by KNDS, the combined Franco-German land systems entity, comprising KMW & Nexter, which also showcased its version of a Euro-tank concept at the Eurosatory last year. These multi-billion dollar joint defense programs, which are currently in the very initial stages, are

likely to provide a lot of traction to the European defense industrial base over long term.

The modernization & upgrade of existing armor and replacement of existing vehicles with current, off the shelf solutions continues unabated across most parts of the world and is providing significant growth avenues for the European manufacturers of armored vehicles, as showcased by the Rheinmetall's win in Australia's hotly contested Land 400 Phase 2 program, worth up to \$5 billion, with its Boxer platform in 2018. In Europe, the U.K.'s modernization drive for its armored vehicles continues amid budgetary constraints & uncertainties with the country handing out contracts to GDELS for supplying it with over 500 AJAX tracked vehicles earlier worth over £3.5 billion, likely to downselect amongst the final 2 contenders for the Challenger 2 MBT update in 2019 and is looking to tap Rheinmetall's Boxer platform with a requirement for over 500 vehicles worth £4.4 billion.

Thus, with acknowledgement of strong external threat perceptions, there is political consensus on fast tracked modernization, upgrade & replacements, which have been further corroborated by technological developments by the industry which are promising next generation capabilities at affordable costs. For instance, BAE Systems showcased its Black Night concept highlighting its proposed upgrades for the British Challenger 2 MBT Upgrade program, as part of its bid in 2018, featuring advanced night combat capabilities and the inclusion of an active protection system. The European industrial base, thus, is readily gearing up with a spurt in activity after a long phase of being dormant and is looking forward to a long & much anticipated activity boom with most OEMs reinvigorating & readying up their industrial bases for the action.

Against this dynamic & rapidly evolving market & industry landscape, the 2019 edition of this annual publication provides comprehensive analysis and key insights into the Strategies & Plans being conceptualized & implemented by the Europe's Top 5 Armored Vehicle manufacturers for the near to medium term horizon as the industry braces up for a significant growth phase. The report is unique with reference to its core focus on and deep qualitative analysis of strategies & plans for the industry OEMs. The report also provides a comprehensive SWOT framework analysis on all 5 industry players covered in the report providing useful insights into each player's respective strengths and weaknesses. The report concludes with analysis of key trends, market conditions, potential growth opportunities and outlook for the global armored vehicles market.

Report Excerpts:

Analysis of GDELS' Growth Strategy for Europe focused on Targeted Acquisitions, Vehicle Platform based Variants & Industrial Partnerships as Key Pivots

BAE Systems looking to Initiate & be Part of New Defense Acquisition Programs across Key Global Markets Leveraging JVs, Alliances & Teaming-up Arrangements

Analysis of Rheinmetall's Technology led overall Strategy and Plans to grow beyond being a Regional Player to become a Formidable Land Systems Power

MBTs likely to remain a Mainstay of the Armor Fleets at the Core over medium term despite growing preference for Lighter Protected Mobility Systems

Significant, projected Growth in utilization & role of Active Protection Systems in battlespace of future with development of lighter, accurate, more affordable, & workable systems

Analysis of Emerging Technologies, Systems & Evolution of Threat Landscape, including:- Directed Energy Systems, UGVs, Artificial Intelligence, Drone Swarms & Development of Electric Drivetrains led by advances in Li-Ion battery technology

Relevance & Usefulness: The report will be useful for:

Strategic Planning, Assessment & Decision-Making Processes

Competitor Analysis & Comparative Analysis of covered Industry Players

Identification of & Insights into Potential Growth Opportunities & Avenues

Analysis of Near to Medium Term Strategy Focus and Key Strategies & Plans for all Armored Vehicle Manufacturers

Analysis of Emerging Industry, Market & Technology Trends

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

For Whom: Business Leaders & Key Decision-Makers across Industry Value Chain

The report will be essential for Key Decision-Makers & Senior Industry Executives. The report will be especially useful for Program & Procurement Managers, Defense Procurement Departments & Executives, Top Management of Industry Players & Other Companies, Industry OEMs, Suppliers, Vendors, Land Vehicle MRO Services Providers, Technology & Other Services Solutions Providers 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, Researchers and all those associated with the industry or any of the European Armored Vehicle Manufacturers covered in the report.

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.

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