

# **Global Armored Vehicles Market - Top 7 Market Players - Annual Strategy Dossier - 2024 - BAE Systems, General Dynamics, Oshkosh Defense, Rheinmetall, KNDS, Iveco Defense, Hanwha**

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## **Abstracts**

### **1. Strong Global Demand for Combat Vehicles geared towards Fleet Recapitalization, Capabilities Advancement and Modernization**

The demand for armored vehicles globally has witnessed a strong resurgence over the recent years with the disruption of traditional, rules-based world order and the drastic, unprecedented deterioration in the security environment as the number of ongoing political conflicts reach a new crescendo. The demand for combat vehicles has registered a major surge with their extensive, successful utilization in the ongoing Russia-Ukraine war. The demand has been especially strong for Infantry Fighting Vehicles (IFVs), Armored Personnel Carriers (APCs) and Main Battle Tanks (MBTs) across most regions globally as nations scramble to modernize and replace their existing, Cold war-era, in-service fleets with modern platforms featuring state-of-art & cutting edge mobility, firepower and protection capabilities along with digitalization & network connectivity as the backbone while also offering a lower total cost of ownership. The modernization, development & induction of next-generation combat vehicles has been a top priority for nations across Europe as the threat of a potential land war with Russia resurges to haunt policymakers given that the capabilities of the defense industrial base across Europe are being resurrected and modernized after decades of neglect. The modernization of British Army's Challenger MBTs to Challenger-3 variant and upgrade of French Leclercs to the Leclerc XLR variant, the slow progress being made on the Franco-German MGCS MBT for future and huge orders for new MBTs and IFVs by nations across Eastern Europe, led by Poland, Romania and Czech Republic, bear testimony to the same. The unveiling of new, concept MBTs featuring next-gen capabilities at the EUROSATORY by KNDS and Rheinmetall showcase the resurging

demand and interest in heavy armor amid rapidly altering geopolitical realities. The United States, too, is pursuing a similar pathway with the replacement of M2 Bradleys on the anvil; after the AMPV program which is replacing the M113 APCs and is under full-scale production phase; being a top acquisition priority besides modernization of M1 Abrams to the M1E3 variant. Australia, too, has been under an unprecedented armor renaissance in history with its massive, multi-phase Land 400 program which has so far seen procurement of IFVs, APCs/CRVs and tactical logistics vehicles in significant numbers in contracts worth almost US\$10-\$12 billion cumulatively.

## 2. Global A&D Market in a Major Upswing Phase amid Disruption of Traditional World Order and Geopolitical Tensions & Conflicts

Global defense spending, clearly, is on an upward growth trajectory, driven by geopolitical shifts, and is projected to reach \$2.5 trillion by 2025, thereby, providing the defense industrial bases across most key markets significant growth opportunities for the medium term horizon as it is desperately trying to ramp-up production rates over near term amid supply chain constraints to backfill depleting U.S. & NATO allies' stockpiles of munitions, missiles & weapon systems besides fulfilling Ukraine's critical requirements and to meet growing international demand in the era of great power competition. The U.S. Defense Budget continues to be in a growth phase and is pegged at \$833 billion for FY2025 as the focus remains on strategic rivalry with China, supporting allies, namely, Ukraine, Israel and Taiwan, and backing technological advancements as the core pivot amid near-term political uncertainty over the upcoming U.S. Presidential elections.

## 3. Global Economy Heading towards Slowdown

The global economy, however, is projected to be heading towards a slowdown in 2024 following continued monetary policy tightening posture by central banks globally over the recent years to check high inflation. The situation has been further compounded by the sustained geopolitical instability led by the ongoing Russia-Ukraine war, the Israeli military operations in Gaza & escalation of tensions with Iran as well as Hezbollah and continued Houthi attacks on commercial shipping which have already raised freight rates and come a double whammy for the global economy which has already regressed to its range-bound, typical, average movement of under 3% annually. However, any further, major potential shocks at this time threaten to send the global economy spiraling down into a recessionary cycle.

Against this backdrop, the report analyzes & provides comprehensive insights and detailed analysis into the Global Top 5 Armored Vehicles Manufacturers with focus on a blend of quantitative & qualitative analysis. The report provides detailed analysis on the Global Top 5 Armored Vehicle OEMs, including:-

## 4. For Whom: Key Decision-Makers across Industry Value Chain

The report will be essential & a key resource for those associated with and having strategic interest in the Global Armored Vehicles Market. The report will be especially useful for:-

Key Decision-Makers across the Aerospace & Defense Industry

Defense Procurement Executives & Defense Departments

Program Offices & Program Managers

Top Management of Industry OEMs, Players across Industry Value Chain & Other Companies

Suppliers, Vendors, Technology & Services Providers and other Key Players in the Industry Value Chain

Existing & Potential Investors

Industry & Company Analysts

M&A Advisory Firms

Strategy & Management Consulting Firms

PE Firms, Venture Capitalists and Financing & Leasing Companies

Researchers and all those associated with the industry in general

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