

Rheinmetall Defence - Strategy Brief - Q1 2014 - Strategic Initiatives, Developments, SWOT, Trends & Outlook

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Abstracts

1. Overview & Rationale:

The report provides a holistic assessment as well as comprehensive analysis of the Business Activities, Strategic Initiatives, Strategic Measures, Business & Strategic Developments and Strategic Moves for Rheinmetall Defence for Q1 2014 and provides an analysis of how they integrate with & fit into the medium term strategic picture & overall business strategy against the backdrop of an evolving industry landscape & shifting global dynamics with the industry reeling under the pressure of significant defense spending cuts across traditional markets and has started treading on the consolidation path as highlighted with the mergers of Force Protection & GDLS and Panhard & Renault Truck Defense earlier amid a difficult & uncertain global macroeconomic environment marked by slow pace of ongoing recovery in Western Europe from the debt crisis and a multitude of economic challenges in the United States.

2. **Backdrop:** Global Armoured Vehicle Industry under Tremendous Pressure & Deploying Coping Strategies & Mechanisms to Partially Offset Large Magnitude Defense Budget Cuts:

The allied operations & campaigns across Iraq & Afghanistan war theatres under Operation Iraqi Freedom and Operation Enduring Freedom post 9/11 drove the growth of defense industrial base across North America & Western Europe and especially bolstered armoured vehicle manufacturers given the significant utilization & threat from IEDs & other asymmetric tactics across these theatres throughout these campaigns. The industry segment saw the entry of new players like Navistar into the armoured

vehicle segment through these years, witnessed the growth of niche players like Force Protection and observed the significant expansion of order backlog at industry heavyweights, especially, GDLS & BAE Systems. However, with the winding up of allied operations and the scheduled withdrawal of troops from Afghanistan through 2014 and the commensurate defense spending cuts; the activity across almost all key North American OEMs has dropped substantially, topline across OEMs has shrunk by almost one third to half as compared against peak defense spending levels while the competitive intensity for new defense contracts award has risen tremendously with cost competitiveness becoming a critical parameter for new contract awards.

The defense spending situation across North America & Western Europe is likely to further tighten over near to medium term. In the United States alone, a 45% cut in defense spending on tactical wheeled vehicles is anticipated through the 2013 to 2017 period with the situation likely to further worsen with the full impact of sequestration cuts coming into effect. The axing of Army's GCV program in the FY2015 budget request is a prime example of the potential fallouts of the same. The industry, consequently, has been on the consolidation path and has already seen the acquisition of Force Protection by GDLS. Further, strategic alliances & collaboration trend amongst OEMs is on the rise aimed at sharing development costs as well as risks & enhanced cost competitiveness amid a difficult budgetary scenario. OEMs are focusing on strengthening the commercial businesses in their portfolio besides sniffing & harnessing potential opportunities in sustainment support, upgrades & retrofitment of existing in-service vehicle fleets besides looking at & pursuing exports to international markets to partially offset spending cuts. The strategy seemed to have delivered with GDLS as well as Oshkosh winning a few, large-ticket export deals from the Middle-East of-late. Rheinmetall, too, is leveraging the export route effectively to offset spending cuts in Europe with a fresh spate of international orders from South Africa & Asia in the Air Defence domain.

3. Scope of Analysis: Strategic Initiatives, Developments, Plans, SWOT, Key Industry Trends & Force Field Analysis

The report provides Key Insights into the Key Strategic Initiatives, Developments & Plans being pursued by Rheinmetall Defence. The report also includes an incisive SWOT framework analysis on the company; which is used extensively for an assessment of the internal as well as external business environment of an organization as part of the strategic planning process. The framework generates a snapshot of the company's inherent strengths & weaknesses as part of the internal environment assessment and outlines potential growth opportunities as well as threats as part of the

external environment assessment.

The report concludes by providing comprehensive insights into the key industry trends, issues, challenges, risk factors besides identifying key driving & restraining forces & assessing their potential degree of impact through a force field analysis followed by industry outlook for 2014.

4. Relevance & Usefulness: Strategic Business Analysis, Planning & Decision-Making Process

The report provides insights & inputs to be incorporated into the broader strategic planning & decision making processes and will be essential from a competitive analysis standpoint as well.

The report will be useful for:

Competitive Assessment as well as Comprehensive Strategic Business Analysis

Assessment of degree of environmental responsiveness as well as strategic orientation

Gaining access to Key Inputs for Strategic Planning & Decision-Making Process

Identification of opportunities which could be capitalized upon

Identification of potential threats in the business environment

Analysis of and Insights into key Strategies & Plans being pursued by the company

Identifying & highlighting areas for Strategic Changes, Adjustments & Realignment

Gaining a Strategic Perspective on the Business & Strategic Outlook for 2014

Access to Key Industry Trends, Issues & Challenges, Risk Factors & Industry Outlook for 2014

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

The report would be essential for those having strategic interest in Rheinmetall Defence and the Global Defense & Aerospace Industry & will be especially useful for Key Decision-Makers, Top Management of Companies, OEMs, Suppliers, Distributors, Vendors and other Key Players in the Industry Value Chain as well as existing & potential Investors, Industry & Company Analysts & those associated with the Industry or the Company.

6. Report Highlights: Visual Representation/Orientation with a Slide based Architecture

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations with visual representation & orientation based on a slide architecture, 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.

7. Key Takeaways: Enhances Scope of Utilization/Application with Visual Representation & Saves Time

This PowerPoint architecture based report provides high readability & ease of navigation and saves significant amount of time by saving the end-user the effort of sifting through voluminous pages of text besides enhancing the scope of retention, immediate utilization & application of analysis with visual representation and incorporation of relevant images to support & supplement the analysis.

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Industry Outlook for 2014

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