

Strategy Playbook - 2025 - World's Top 5 Combat Vehicle Manufacturers - BAE Systems, GDLS, GDELS, Oshkosh Defense, Rheinmetall - Strategy Focus, Key Strategies & Plans, SWOT, Trends & Growth Opportunities, Business and Market Outlook

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Abstracts

1. A World Order in Flux, Deteriorating Security Environment and Surging Global Defense Spending Driving Renaissance in Global Defense Industrial Base

This Strategy Playbooks report analyses & traces the overall Strategy Focus and provides deep & invaluable insights into the Key Strategies & Plans being pursued by the World's Top 4 Combat Vehicle manufacturing Companies for the near to medium term horizon amid a complex, difficult & challenging global macroeconomic environment marked by surging defense spending globally which grew by 7+% year-on-year and almost touched the \$2.5 trillion level in 2024 amid rising geopolitical tensions & conflicts, looming uncertainty over a transactional approach to U.S. foreign policy alienating traditional allies and renewed trade wars under Trump Administration 2.0

2. Global Aerospace & Defense Industrial Base in a Major Upswing Phase

The Global Aerospace & Defense industrial base, consequently, is in a major upswing phase as the shadow of geopolitical conflicts returns with the traditional, rule-based world order facing a serious challenge from the revisionist powers and traditional geopolitical fault lines experiencing renewed tectonic friction and triggering the outbreak of armed conflicts across the Middle East and Europe regions. Consequently, it has led to soaring global demand for missiles, missile defenses & interceptors, UAVs/UASs, fighter jets, armored combat vehicles and artillery & ammunition. The resurgence of Russia as Europe's regional hegemon and China's military ascendancy as the regional

belligerent in the Asia-Pacific, along with the Gordian knot of a nuclear-armed North Korea and almost-nuclear Iran; collectively poses a serious challenge to the U.S.-led traditional world order while also threatening European and APAC-based allies as Trump's return to White House and transactional approach to foreign policy has caused visible fissures among traditional allies in the West translating into a clear, significant and anticipated geopolitical advantage for Putin who is effectively holding the Trump card. Trump's betrayal of Ukraine, distancing himself from Europe with demand for a further increase in defense spending to the Cold War peak level of 5% of the GDP by NATO members and strikes on Iran's nuclear facilities have already caused ripples of geopolitical tensions & escalation of war globally.

3. Combat Vehicle Market Landscape in Renaissance Mode

The latest geopolitical developments have led to massive efforts being undertaken across most regions globally to revitalize defense industrial bases and to ramp-up production rates for core defense systems and for rapid upgrade, modernization and recapitalization of in-service, Cold War-era legacy defense systems across most regions globally with Europe at the forefront as the continent braces for a possible scenario of defending itself from Russia without the U.S. with Putin having effectively restructured the Russian economy towards military equipment production and spending heavily on defense. In the U.S., the replacement of U.S. Army's Bradley tracked IFVs remains the top growth avenue with a face-off already lined-up between GDLS & American Rheinmetall for a downselect. In Europe, the joint development of the MGCS by Germany & France is set to replace the Leopard 2 and the Leclerc MBTs respectively as a scratch-up combat system solution by 2040 and the program is progressing steadily with the establishment of the joint company in April 2025. In the Nordic & Baltic regions, latest NATO members, namely, Sweden & Finland, along with Norway, Estonia, Lithuania and the Netherlands, have placed a huge, joint order for the CV90 IFVs while the Czechs & the Ukrainians keenly await their ordered CV90s.

4. Challenging Global Macroeconomic Environment

The taming of inflation, monetary policy easing and the relative easing of supply chain woes globally have come as welcome news for the world economy in 2025. However, continuing military conflicts across Ukraine & the Middle East, returning specter of trade wars under Trump era 2.0 and rising debt levels, along with the need to sustain substantial increase in defense spending levels amid slowing economic growth & stagflation amid a rapidly deteriorating security environment globally; collectively pose a serious challenge to it over near term. Overall, the world economic growth is projected

to remain limited to 2.3% for 2025 which is almost 540 bps below the average GDP growth rate for the average pre-pandemic growth rate registered through the 2010s decade.

5. Detailed Insights into the Overarching Strategy Focus and Key Strategies & Plans of Combat Vehicle OEMs

The report provides a comprehensive analysis into the Strategy Playbooks of the World's Top 4 Combat Vehicle Manufacturing Companies featuring detailed insights into the overarching, near-to-medium term strategy focus and key strategies & plans being developed and pursued by them to adroitly navigate the emerging market landscape and effectively capitalize upon tailwind and windfall, in terms, of growth opportunities. The report provides a detailed and comprehensive analysis on the industry as well as the companies, ranging from defense budgetary analysis to covering all major existing & upcoming defense programs and market developments. An insightful & comprehensive SWOT framework analysis is also included on the OEMs; providing a comprehensive scan, assessment & analysis of the prevailing internal as well as external business environment of the company. The framework outlines the company's core, 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 also incorporates a comprehensive analysis and review of the key market, technology & industry trends, along with issues & challenges, which are likely to impact and shape the industry's future over near to medium term. The report also identifies key driving & restraining forces for the industry & assesses their potential degree of impact through an insightful force field analysis. The report concludes by providing a near-to-medium term market outlook and demand growth projections for the Global Combat Vehicles Market.

6. 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 Aerospace & Defense Industry. The report will be especially useful for:-

Key Decision-Makers

Defense Departments, Program Managers & Contracting Executives

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

Suppliers, Vendors, Technology & Other Services Providers in the Industry Value Chain

Existing & Potential Investors

Industry & Company Analysts

M&A Advisory Firms

Strategy & Management Consulting Firms

PE Firms, Venture Capitalists, Financing & Leasing Companies and Start-Ups

Researchers, Students, Educators and all those associated with the A&D industry in general

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