

Armor Procurement Forecast For US Military Ground Vehicles

Vector Strategy's **Armor Procurement Forecast for US Military Ground Vehicles** presents armor procurement rates from fiscal year 2005 to fiscal year 2015. Combat wheeled and tracked vehicles, such as the Stryker, Abrams, Bradley, and Ground Combat Vehicle, as well as all tactical wheeled vehicles, such as the HMMWV, JLTV, FMTV, MTRV, MRAP, and MATV are addressed in this report. The forecast includes US Army, US Marine Corps, US Air Force, and US Navy ground vehicle and armor requirements to support the deployment of U.S. troops.

Vehicles and Armor Programs Addressed In This Forecast

- All HMMWV variants and related armor kits
- Up Armored HMMWV Recapitalization Program
- Family of Medium Tactical Vehicles (FMTVs) – armor programs, kits, and armored cabs
- Family of Heavy Tactical Vehicles (FHTVs) – armor programs, kits, and cabs (includes M915, M916, HEMTT, PLS, HET, and similar)
- Medium Tactical Vehicle Replacement (MTRV) and Logistics Vehicle System Replacement (LVSR) – vehicle and armor procurement
- Mine Resistant Ambush Protected (MRAP) and MATV vehicles and armor procurement
- Armored Security Vehicle (M1117) armor programs and kits
- Mine Protected Vehicle Family (MPVF) armor programs and kits
- Bradley Fighting Vehicles, including BFIST, the A3 Block 2 upgraded, armor upgrades and kits, BRAT, and BUSK
- Stryker vehicle new builds, armor programs including SLAT and SRAT
- Stryker Modernization Program
- Abrams Tank including the M1A3 upgrade program, armor upgrades, and kits such as TUSK and ARAT
- Hercules M88 armor programs and kits
- Armored Personnel Carrier (M113) armor upgrades and kits
- Light Armored Vehicle (LAV) armor upgrades and kits
- Ground Combat Vehicles (GCV), Expeditionary Fighting Vehicles (EFV), Marine Personnel Carriers (MPC), Joint Light Tactical Vehicles (JLTV) and other new armored vehicles that are projected to have procurement commitments within the forecast's time horizon.



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Forecast Objective

This forecast is an analysis and forecast of the U.S. military ground vehicle armor market. Forecast horizon is from fiscal year 2005 to fiscal year 2015.

The forecast provides a full description of each vehicle armor program, including history of the vehicle and armor program, planned upgrades, publicly available armor design elements, and related contractors and suppliers.

For each armored vehicle, the following quantitative information is provided: annual vehicle procurement rates, vehicle unit costs, armor value (\$) per vehicle, total value of armor procured annually in conjunction with that vehicle. Similar information is available for armor kits and vehicle modifications / recapitalizations that include armor components.

Methodology

Vector Strategy analyzes DoD, Army, Navy, USMC, and Air Force fiscal year regular and supplemental budget requests. We also track congressional actions on defense budgets throughout the year.

We gather military program office communication regarding specific armor programs during conferences, in press releases, and in industry publications; and review congressional testimony regarding vehicle and armor programs.

We monitor contract awards, access contract documents, and adjust our forecast based on contract quantities and costs actually awarded.

Finally, we review vehicle and armor build rates of manufacturers to determine current production volumes to validate our estimate of current market size and procurement rates.

Who Should Buy This Report

This report is essential for business executives responsible for designing, manufacturing, or marketing armor kits, armored vehicles, or components utilized in the production of vehicle armor such as composites, ballistic fabrics, ceramics, and metal alloys.

The report provides information needed to develop effective business plans, capital investment strategies, and focus your company's business development activities.

Report Format

The report will be provided in an electronic format (PDF) with full text commentary. All data tables and chart are provided in the PDF document.

Publication Dates and Price

This report is published three times per year. The first publication is in March or April after the US Army, US Navy, US Air Force and USMC each release their fiscal year budget requests and justifications in February. The second publication is mid year to reflect any additional supplemental budgets that may be released or other industry events affecting procurement levels. The third publication is at the end of the year after the Congressional Conference Report on the DoD Appropriations Act and the DoD Authorization Act is publicly available.

A single release of the report may be purchased for the price of \$2,995 for a single site license and \$4,495 for an enterprise wide license. Clients who purchase consecutive and subsequent releases will receive a 20% discount on their purchase. A military / government discount of 15% is offered. Annual subscriptions will no longer be offered.

Payment must be made in full before a report will be shipped to purchasers. Purchases may be made via check, credit card, or EFT. Please contact our office at 910-420-2208 for more information or complete and fax back the order form on the last page of this brochure.

About Vector Strategy, Inc.

Vector Strategy, Inc. is based in Southern Pines, NC near Ft. Bragg. We offer reports, publications, and other market research services in the military armor industry.

We help your company stay abreast of technology trends, government procurement, market size and growth, industry players, supply chain issues, and other intelligence that business executives need to make informed decisions and build effective strategic plans.

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Comments from Vector's Armor Forecast for US Military Ground Vehicles

Conservatism prevails within Vector's March 2010 forecast. There are many reasons for conservatism:

- An excess of tactical wheeled vehicle inventory due to over-procurement for modularity and ARFORGEN needs.
- Declining OCO and supplemental war funding as deployed troop levels decline in Iraq and Afghanistan.
- A lower percentage of FY10 and FY11 OCO and supplemental war funding is directed at procurement funding (more addresses personnel and O&M accounts) than in FY07 to FY09.
- A suspension in armor B-kit procurement for tactical vehicles as the US Army determines if they should procure additional kits now to armor a higher percentage of trucks or invest in R&D to develop advanced armor solutions that could be procured in the future to address new threats.
- Overall National budget pressures will squeeze DoD procurement funding.
- A shift from new vehicle procurement to recapitalizations, extended service programs, and vehicle upgrades.
- A lull in procurement as we wait for several recapitalization and modernization programs to emerge from Milestone C.
- A longer lull as we wait for several new vehicle platforms to reach low rate initial procurement (LRIP).

Questions Answered In This Report

- How many Up Armored HMMWV (UAH) Recaps will be procured over the next 5 years? How will the US Army balance their acquisition of UAH Recaps and new JLTVs?
- How much is the US Army and the USMC investing in JLTV RDT&E and procurement funding through FY15?
- Does the DoD have enough MRAPs and MATVs for Afghanistan?
- What is the production rampup schedule for the Ground Combat Vehicle, JLTV, EFV, and the MPC?
- How strong will the recap programs for HEMTT and PLS be in FY11 to FY15, how will those programs affect new vehicle procurement, and is that even relevant to armor manufacturers?
- How much armor procurement and survivability enhancements will be generated by the Abrams M1A3 upgrade program, the Bradley A3 Block 2 program, and the Stryker A1 Modernization program over the next five years?



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