

US Military Ground Vehicle and Armor Procurement Forecast 2020

Vector Strategy's **US Military Ground Vehicle and Armor Procurement Forecast** presents vehicle and armor procurement rates from fiscal year 2005 to fiscal year 2020. 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, MTVR, 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 US troops.

Vehicles and Armor Programs Addressed In This Forecast

- Up Armored HMMWV (UAH) Recapitalization Programs
- Family of Medium Tactical Vehicles (FMTVs)
- Family of Heavy Tactical Vehicles (FHTVs) – (includes M915, M916, HEMTT, PLS, HET, and similar)
- *NEW*: Tactical Wheeled Vehicle Protection Kits and Crew Protection Spinouts
- Medium Tactical Vehicle Replacement (MTVR) and Logistics Vehicle System Replacement (LVSR)
- Mine Resistant Ambush Protected (MRAP) and MATV Modifications and Recapitalizations
- Armored Security Vehicle (M1117)
- Mine Protected Vehicle Family (MPVF)
- Bradley Fighting Vehicle including ODS Situational Awareness upgrades
- Stryker Vehicle new builds, and Stryker Modernization Program
- *NEW*: Abrams Tank including the sustainment of armor facilities
- Hercules M88
- *NEW*: Armored Multi-Purpose Vehicle (AMPV) which is the potential M113 replacement
- Amphibious Assault Vehicle (AAV) Upgrade
- Light Armored Vehicle (LAV)
- Ground Combat Vehicle (GCV), Amphibious Combat Vehicle (ACV), Marine Personnel Carrier (MPC), Joint Light Tactical Vehicle (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 report provides an analysis and forecast of US military ground vehicle and armor procurement. The forecast horizon is from fiscal year 2005 to fiscal year 2020.

The forecast provides a full description of each vehicle and 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, US Army, US Navy, USMC, and US Air Force fiscal year regular and overseas contingency operations 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 or manufacturing armor kits, armored vehicles, or components utilized in the production of vehicle and 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 two to three times per year. The first publication is in March or April after the US Army, US Navy, US Air Force and USMC 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. Actual publication dates are dependent on timing of Congressional, DOD, and White House budget related activities.

A single release of the report may be purchased for the price of \$3,495 for a single site license and \$5,245 for an enterprise wide license. Clients who purchase consecutive and subsequent releases will receive a 15% discount on their purchase. A military / government discount of 15% is offered. Military and consecutive purchase discounts may not be combined. Annual subscriptions are no longer offered. Discounts may not apply to special services.

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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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Questions Answered In This Report

- How many Up Armored HMMWV (UAH) Recaps will be procured over the next 5 to 10 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 vehicle RDT&E and procurement funding through FY20?
- What is the production ramp-up schedule for the GCV, JLTV, and the MPC?
- How strong will the recap programs for HEMTT and PLS be in FY12 to FY20, 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 combat modernization programs through FY20?
- How much tactical wheeled vehicle armor is the DoD procuring annually through 2020?

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New Material Incorporated Into the May 2011 Release:

- The FY12 US Army, USMC, US Air Force, US Navy, and DoD budget requests for military ground vehicles released in February 2011.
- Military Program Office and US Army G-8 presentations from the NDIA Combat Vehicle Conference in November 2010 and the TWV Conference in February 2011.
- The FY11 DoD Appropriations Act passed by Congress and signed into law in April 2011.
- April 2011 USMC Industry Day information on the AAV SLEP, MPC, and ACV programs.
- US Army TWV Board of Directors April 2011 review.
- Military Program Office updates presented at the IDGA Tactical Vehicle Conference in April 2011.
- All vehicle and armor awards through April 15, 2011.
- Early May 2011 press releases and funding indications surrounding the HASC markup of the FY12 DoD budget request.



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