

US Military Body Armor Industry: Forecast and Analysis

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Vector Strategy, Inc.
26 Pinecrest Plaza, #134
Southern Pines, NC 28387
Phone: 910-420-2208
Fax: 910-401-1597
www.vector-strategy.com



Report Abstract and Objectives

This groundbreaking report provides a comprehensive analysis of the US military body armor industry. The report offers full descriptions of major military body armor programs, including history of the armor program, planned and anticipated upgrades, and publicly available armor design elements.

Future military body armor initiatives are discussed, including new body armor components anticipated between now and 2015. Technologies which are forecasted to impact ballistic performance and body armor construction are also identified.

Forecasted procurement rates of body armor system components for 2000 to 2015 are reported in number of units and millions of dollars. Material requirements associated with body armor procurement are projected in weight (pounds), including ballistic fiber and ceramic tile requirements. Technology, geopolitical, and defense trends affecting the military body armor market are also discussed.

The report provides a presentation of the industry's supply chain and a discussion of each segment within the supply chain including raw material suppliers, body armor integrators and manufacturers, and ballistic test laboratories. In addition, detailed company profiles of significant body armor manufacturers, raw material suppliers, and ballistics testing laboratories are included in an appendix to the report.

Primary research has been conducted with industry participants at all levels of the supply chain and with US military and governmental agencies. This primary research combined with Vector Strategy's proven approach to developing market forecasts and material requirement projections have yielded a thorough and thought provoking analysis of the US military body armor industry.

An analysis of this magnitude has never been published before and the resources required to produce the report were significant. Vector Strategy employed subject matter experts in body armor, conducted over 100 interviews, and analyzed substantial amounts of secondary research to develop this report.

Who Should Purchase This Report

This report is essential for business executives who are responsible for designing, manufacturing, and marketing military body armor and the raw materials used in the production of body armor such as composites, coatings, ballistic fibers and fabrics, ceramics, and other technologies utilized in body armor manufacturing. Additionally, this report serves as a vital tool for organizations involved in specifying, procuring, or testing military body armor.

The report provides quantifiable information needed to develop effective business plans; capital investment strategies; investor, shareholder, and stockholder reports; and provides solid data for a company's business development activities.

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 to the military armor industry. This US military body armor industry report is a natural extension of other successful publications from Vector Strategy including **Armor Procurement Forecast for US Military Ground Vehicles** and **Material Requirements & Supply Chain Analysis of Armor Procurement for US Military Ground Vehicles**. Information regarding both of these reports is available on Vector Strategy's website or may be obtained by calling our office.

Our clients include vehicle OEMs, armor manufacturers, raw material suppliers, equity investment firms, and merger & acquisition specialists. A list of client references is available upon request. We help companies stay apprised of technology trends, government procurement, market size and growth, industry players, and supply chain issues. We provide market intelligence that business executives need to make informed decisions and build effective strategic plans.

Report Format

The report is written in full text commentary. It is 271 pages in length, and contains 27 figures and 37 tables of technical and market information.

The report is organized into 9 main sections and 4 appendices which contain a glossary of abbreviations, sustainment rate assumptions, average selling price assumptions, and detailed profiles on 28 companies in the US military body armor supply chain.

MS PowerPoint presentations will be available upon request.

Delivery and Price

The report will be delivered electronically via a PDF file (approximately 4 MGs) after payment in full is received. Payment may be made via credit card, check, or electronic funds transfer. There are two pricing options for this report:

- The price is \$8,990 for a report which includes both a procurement forecast and a material requirements forecast; this report version includes all report sections. **Now offering a 25% discount on this price due to the report's 2009 publication date.**
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Vector Strategy limits their own public release of report data at industry conferences and in press releases to broad abstracts and overall market trends to protect the investment that clients make in their reports.

Research Methodology

Vector Strategy has invested ten months of research, analysis of data and information, development of procurement forecasts and material requirements, and writing to publish this report. Procurement forecasts and material requirements have been refined with industry feedback. Independent subject matter experts have verified technical data and industry trends. Throughout the project's duration, Vector Strategy has persistently strived to present an accurate, unbiased, and systematic analysis and forecast of the US military body armor industry.

Vector Strategy conducted over 100 primary research interviews with industry participants. Interviews ranged in length from 30 minutes to 2 hours. Most interviews were conducted via telephone; some interviews were conducted in person during onsite visits or during industry trade shows and conferences.

Vector Strategy engaged interviewee participation from all levels of the supply chain and amongst various industry stakeholders. Fiber suppliers, fabric and uni-directional manufacturers, ceramic tile suppliers, hard plate integrators, soft body armor integrators and manufacturers, industry subject matter experts, retired military personnel, research experts and technologists, and body armor designers participated in our interviews.

During this project Vector Strategy attended approximately fifteen industry conferences related to body armor. We engaged with industry and military personnel during those conferences to discuss industry trends, current body armor solicitations, and supply chain dynamics.

Vector Strategy reviews a multitude of secondary research sources on a daily basis to stay abreast of published information relative to the armor industry. We have text searches set up on several alert services that scan published information for over 150 key words or phrases.

Purchase description documents are typically issued by the US Army and the USMC during the solicitation process for a new body armor component. These documents contain non classified technical and performance requirements for body armor components and purchase descriptions for all major body armor components have been extensively reviewed by Vector Strategy.

Vector Strategy has conducted extensive research and analysis of US military contracts awarded for body armor since 2004. In total, over 200 IDIQ and delivery awards have been individually documented and reviewed. In addition, Vector Strategy has built a body armor awards database containing 30,000 records culled from the Federal Procurement Database System related to governmental purchases of body armor.

Publicly available solicitations and sources sought notices related to military body armor are constantly monitored and reviewed. Source documents and amendments are tracked, downloaded, and analyzed. This material is a significant source of publicly available information on near term and future military body armor procurement and technology trends.

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www.vector-strategy.com