

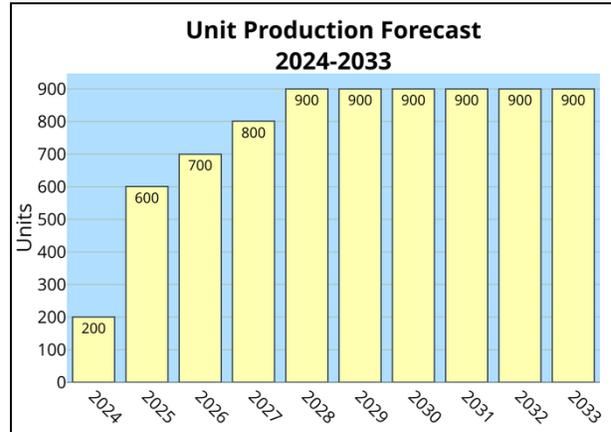
# ARCHIVED REPORT

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## French Tactical Vehicles

### Outlook

- Following years of mergers and acquisitions, Arqus has become France's leading manufacturer of tactical vehicles
- France's latest Military Programming Law seeks to acquire around 9,500 vehicles by 2035
- The push in procurement seeks to address military shortcomings exposed by the Ukraine conflict



### Orientation

**Description.** Wheeled tactical and logistics vehicles.

**Sponsor.** The French Ministry of Defense, through the Direction Générale de l'Armement (DGA), sponsors the development and French Army procurement of tactical vehicles.

Contractors have also developed several vehicles as private ventures.

**Licensees.** See **Program Review**.

**Status.** Development through serial production.

**Total Produced.** From 1980 through 2023, we estimate the various contractors produced at least 323,973 tactical vehicles.

**Application.** Military-standard wheeled vehicles optimized for transporting personnel and cargo in all conditions.

**Price Range.** In 2023 U.S. dollars, the unit prices of the vehicles covered in this report range from \$16,820 for the SOFRAME VLA to \$783,990 for the TRM 700.

In 2023 U.S. dollars, the Auverland A4 series carries an average unit price of \$158,628 for French DGA procurement.

### Contractors

#### Prime

<b>Arqus</b>	<a href="https://www.arqus-defense.com">https://www.arqus-defense.com</a> , 15 bis, Allée des Marronniers, Camp de Satory, Versailles, France, Tel: + 33 1 77 71 20 00, Prime
<b>Arqus</b>	<a href="https://www.arqus-defense.com">https://www.arqus-defense.com</a> , Le Point du Jour, Saint-Nazaire, France, Tel: + 33 2 4022 3371, Fax: + 33 2 4066 3096, Email: <a href="mailto:info@acmat.fr">info@acmat.fr</a> , Prime
<b>SOFRAME</b>	<a href="https://www.soframe.com">https://www.soframe.com</a> , 29 rue du 14 Juillet, BP 1 Hangenbieten, Tanneries, France, Tel: + 33 3 88 38 98 00, Fax: + 33 3 88 96 06 36, Email: <a href="mailto:lohrind@lohr.fr">lohrind@lohr.fr</a> , Prime

Contractors are invited to submit updated information to Editor, International Contractors, Forecast International, 75 Glen Road, Suite 302, Sandy Hook, CT 06482, USA; [rich.pettibone@forecast1.com](mailto:rich.pettibone@forecast1.com)

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### Technical Data

**Note:** The following table is a sample listing of French tactical vehicles both past and present and is by no means exhaustive. With much of the manufactures now consolidated under Arquus, antecedent companies are indicated in parentheses.

<u>Designation</u>	<u>Drive</u>	<u>Load Class</u>
<u>Manufacturer – Arquus</u>		
ARMIS	4x4	6 tonne (est)
ARMIS	6x6	9 tonne (est)
ARMIS	8x8	15 tonne (est)
Fortress Mk2	4x4	2 tonne
Higuard	6x6	4 tonne
Scarabee	4x4	NA
Sherpa Light	4x4	2.6 tonne
VBAE	4x4	TBA
VT4	4x4	900 kg
<u>Manufacturer – Arquus (ACMAT)</u>		
VLRA ALM TPK 4.15 FSP	4x4	1.5 tonne
VLRA ALM TPK 4.15 LRM	4x4	1.5 tonne
VLRA ALM TPK 4.15 SM3	4x4	1.5 tonne
VLRA ALM TPK 4.15 STL	4x4	1.5 tonne
VLRA ALM TPK 4.20 BL	4x4	1.5 tonne
VLRA ALM TPK 4.20 SAM	4x4	2.5 tonne
VLRA ALM TPK 4.20 SM3	4x4	2.5 tonne
VLRA ALM TPK 4.20 STL	4x4	2.5 tonne
VLRA ALM TPK 4.20 PMB	4x4	1.5 tonne
VLRA ALM TPK 4.20 VCT	4x4	1.5 tonne
VLRA ALM TPK 4.20 SL7	4x4	2.5 tonne
VLRA ALM TPK/TQM 4.20 FFM	4x4	2.5 tonne
VLRA ALM TPK/TQM 4.21 SM3	4x4	2.5 tonne
VLRA ALM TPK 4.25 SH	4x4	3.0 tonne
VLRA ALM TPK 4.25 F	4x4	3.5 tonne
VLRA ALM TPK 4.25 SAM	4x4	3.5 tonne
VLRA ALM TPK 4.25 STL	4x4	2.5 tonne
VLRA ALM TPK 4.30 FAM	4x4	2.5 tonne
VLRA ALM TPK 4.30 FAE	4x4	2.5 tonne
VLRA ALM TPK 4.30 FMA1	4x4	2.5 tonne
VLRA ALM TPK 4.30 FMA2	4x4	2.5 tonne
VLRA ALM TPK 4.30 FME	4x4	2.5 tonne
VLRA ALM TPK 4.30 FRA	4x4	2.5 tonne
VLRA ALM TPK/TQM 4.31 FFM	4x4	3.0 tonne
VLRA ALM TPK/TQM 4.31 FPTL	4x4	2.5 tonne
VLRA ALM TPK 4.32 SB	4x4	3.0 tonne
VLRA ALM TPK 4.33 SB	4x4	3.2 tonne
VLRA ALM TPK 4.35 SCM	4x4	2.5 tonne
VLRA ALM TPK 4.35 SM3	4x4	2.5 tonne
VLRA ALM TPK 4.35 VPC	4x4	2.5 tonne
VLRA ALM TPK 4.36 STL	4x4	3.0 tonne
VLRA ALM TPK 4.36 SCM	4x4	3.5 tonne
MTV ALM WPK 4.40 CTL	4x4	4.0 tonne
VLRA ALM TPK 6.35 FFL	6x6	4.5 tonne
VLRA ALM TPK 6.35 SL7	6x6	4.5 tonne
VLRA ALM TPK 6.35 TSR	6x6	4.5 tonne
VLRA ALM TPK 6.35 TSR 3 EC	6x6	4.5 tonne
VLRA ALM TPK 6.35/SR 475	6x6	4.5 tonne
VLRA ALM TPK 6.35/SR 475 FFGC	6x6	4.5 tonne
VLRA ALM TPK 6.40 SC	6x6	4.5 tonne
VLRA ALM TPK 6.40 CTL	6x6	2.5 tonne

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<u>Designation</u>	<u>Drive</u>	<u>Load Class</u>
VLRA ALM TPK 6.40 CSD	6x6	4.5 tonne
VLRA ALM TPK 6.40 SH	6x6	4.5 tonne
VLRA ALM TPK 6.40 SM3	6x6	4.5 tonne
VLRA ALM TPK 6.40 WRT	6x6	5.0 tonne
VLRA ALM TPK 6.41 FFL	6x6	4.5 tonne
VLRA ALM TPK 6.41 VPC	6x6	3.0 tonne
VLRA ALM TPK 6.41 SH/STL	6x6	4.5 tonne
VLRA ALM TPK 6.41 GBS	6x6	4.0 tonne
VLRA ALM TPK 6.50 BL	6x6	4.5 tonne
VLRA ALM TPK 6.50 SM3	6x6	5.5 tonne
VLRA ALM TPK 6.50 CTL	6x6	5.5 tonne
VLRA ALM TPK 6.50 SH/STL2	6x6	5.6 tonne
VLRA ALM TPK 6.60 SH	6x6	4.5 tonne
VLRA UMTH 1000	6x6	4.5 tonne
MTV ALM WPK 8.70 CTL	8x8	6.0 tonne
VLRA ALM WPK 8.70 SH	8x8	6.0 tonne
VLRA ALM WPK 8.75 SH	8x8	7.0 tonne
ALTV Pickup 2	4x4	3.5 tonne
ALTV Pickup 4	4x4	3.5 tonne
ALTV Protégé	4x4	3.5 tonne
ALTV SW3	4x4	3.5 tonne

Manufacturer – Arquus (Peugeot)

P4 Light Vehicle	4x4	0.75 tonne
P4 Light Vehicle	4x4	0.75 tonne
Peugeot 504 Dangel	4x4	1.11 tonne
Peugeot 504 Dangel	4x4	1.11 tonne

Manufacturer – Arquus (Auverland)

SAMO	4x4	1.2 tonne
SAMO	4x4	1.8 tonne
Type SC2	4x4	0.95 tonne
Type A2	4x4	1.06 tonne
Type A3	4x4	0.5 tonne
Type A3L	4x4	0.9 tonne
Type A3SL	4x4	1.0 tonne
Type A3F	4x4	1.16 tonne
Type A3FL	4x4	0.91 tonne
Type A4 AVL	4x4	1.5 tonne
TC10	4x4	1.0 tonne
TC24	4x4	2.43 tonne

Manufacturer – Arquus (Renault)

B90-35 D Turbo Van	4x4	1.27 tonne
B90-45 D Turbo Van	4x4	2.27 tonne
B110-35D	4x4	1.27 tonne
B110-45D	4x4	2.27 tonne
R390 Tractor Truck	6x4	24.2 tonne
Sherpa 5	6x6	7.0 tonne
Sherpa 10	6x6	12.0 tonne
TRM 160.10	4x4	4.31 tonne
TRM 160.11	4x4	5.63 tonne
TRM 180.13	4x4	7.31 tonne
TRM 200.11	4x4	5.39 tonne
TRM 200.13	4x4	7.26 tonne
TRM 230.13	4x4	7.10 tonne
TRM 280 16	6x6	12.0 tonne
TRM 280 34	6x6	12.0 tonne
TRM G 290.26	6x4	18.0 tonne
TRM 340.34	6x6	16.0 tonne

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<u>Designation</u>	<u>Drive</u>	<u>Load Class</u>
TRM G 340.26	6x4	26.0 tonne
TRM 700-100 Tractor Truck	6x6	23.0 tonne
TRM 1200	4x4	1.2 tonne
TRM 2000	4x4	2.3 tonne
TRM 4000	4x4	4.0 tonne
TRM 6000	4x4	6.0 tonne
TRM 9000	6x6	9.0 tonne
TRM 10000	6x6	10.0 tonne
TRM 10000 CLD	6x6	10.0 tonne
KERAX 385.40	8x4	16.0 tonne
KERAX 400.32	8x8	20.0 tonne
KERAX 330.19	4x4	12.00 tonne
<u>Manufacturer – SOFRAME</u>		
ARIVE	4x4	NA
Fardier FL 500	4x4	500 kg
Fardier FL 501	4x4	500 kg
Véhicule Léger Aeromobile	4x4	1 tonne
PPLOG	8x8	14.5 tonne
Sakahr	4x4	2.5 tonne



ARMIS 6x6

Source: Arquus

## French Tactical Vehicles

### Program Review

**Background.** Armed forces depend on tactical support and logistics vehicles for a wide variety of general and specific missions, from personnel transport and cargo transfer to artillery and combat vehicle transport.

#### *Two Broad Classes*

In this regard, tactical vehicles fall into two broad classes:

- Military-specific design vehicles optimized for off-road mobility, tactical support, and roles unique to the battlefield environment.
- Commercial vehicles, which generally fill non-tactical roles that do not require a high level of off-road mobility.

Within these classes, the French armed forces employ a diverse range of vehicles to fulfill various roles.

Following years of consolidation and mergers, France's military vehicle manufacturing is primarily undertaken by three firms: Arquus, KNDS, and Soframe.

Arquus is primarily focused on wheeled vehicles. The company was formed in 2016 when Renault Trucks Defense, Atelier de Construction Mecanique de l'Atlantique (ACMAT), and Panhard merged under a single brand. In 2024, Belgium's John Cockerill Group acquired Arquus from Volvo Group for about EUR300 million (\$372 million).

KNDS specializes in tanks, artillery, ammunition and armored vehicles. It is also an amalgamated company formed from France's Nexter Defense Systems and Germany's Krauss-Maffei Wegmann in 2016.

Soframe, a member of the Lohr Group, produces armored vehicles for military and law enforcement applications. They also produce trailers and protected recovery vehicles.

#### *France's Military Programming Law*

The *Loi de Programmation Militaire* (LPM), or Military Planning Law, is a French law that outlines the country's defense policy for a specific period. It sets the goals, resources, and timeline for modernizing the armed forces, acquiring new equipment, and adapting the military organization to contemporary security challenges.

The most recent LPM 2024-2030, intends to remedy weaknesses highlighted by the conflict in Ukraine. While most of it focuses on large programs and ammunition stockpiles, logistics vehicles were also included. Under this effort France plans to purchase

2,086 utility trucks, with a goal of acquiring 9,466 by 2035.

#### *Arquus*

Through a series of mergers and acquisitions, Arquus has become a major French producer of tactical vehicles. In 2001, Volvo Group acquired the truck and bus division of Renault, renaming it Renault Trucks Defense (RTD), with the goal of solidifying its position in the military vehicle market. In 2006, the company expanded its portfolio by acquiring ACMAT, renowned for its VLRA light military truck. In 2012, RTD acquired Panhard General Defense, which manufactured small, armored vehicles such as the VBL (light armored vehicle) and PVP (small protected vehicle). To better reflect its expanded capabilities and unified identity, RTD underwent a rebranding in 2018, adopting the name Arquus. In July 2024, ownership shifted when Belgium's John Cockerill completed its acquisition of Arquus from Volvo for about EUR300 million (\$327 million).

**MAV RX.** In June 2024, Arquus unveiled a prototype 4x4 multirole armored vehicle. The MAV Rx, a 19-tonne armored 4x4, is equipped with a 400-hp engine coupled to a seven-speed automatic transmission. It features a high level of protection (to NATO STANAG 4569) and can carry 10 personnel. It can also be fitted for medical evacuation missions and providing direct or indirect fire support.

**DRAILER.** In June 2024, Arquus announced its first unmanned ground vehicle (UGV). Drailer is a combination of a drone and a trailer in that it can be towed by another vehicle to its area of operations and then operated remotely as a UGV. With a 700 kilogram payload capacity, it can be used for logistics, casualty evacuation, mine clearance and fire support. A fully developed product could appear by 2026.

**CCNG.** In April 2024, the DGA, France's defense procurement agency, awarded Arquus a EUR70 million contract to develop and produce the new generation of tankers, the CCNG (Camion-Citerne Nouvelle Génération, or New-Generation Tanker Truck), to renew its current fleet. The program aims to provide a total of 376 trucks by 2030 to replace the current aging fleet, in line with France's LPM 2024-2030 plan. The first batch of 70 vehicles is scheduled for delivery starting in 2026.

Three versions have been requested to adapt to different missions:

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- A 20m<sup>3</sup> tanker with an armored cabin, known as the "mass transport" CCNG
- A 12m<sup>3</sup> tanker with an armored cabin, known as the versatile "protection device" CCNG
- A 12m<sup>3</sup> tanker with a soft cabin, known as the versatile "unprotected" CCNG

The new-generation tankers are based on an 8x8 off-road chassis from the Renault Trucks civilian range.

**VBAE.** In December 2023, the Organisation for Joint Armament Cooperation (OCCAR) signed a contract with Arquus and Nexter, a company of KNDS, for the development of the Vehicule Blinde d'Aide a l'Engagement (VBAE) on behalf of the OCCAR VBAE participating states Belgium and France. The VBAE is a new armored 4x4 vehicle similar to the U.S. Army's Joint Light Tactical Vehicle (JLTV) and intended to replace the French Army's Vehicule Blinde Leger (VBL). The initial VBAE contract covers the preparation and definition phase. It is valued at EUR15 million (\$16.2 million) and will last approximately two years.

The VBAE program takes advantage of studies performed in the frame of European projects, such as the European Defence Industrial Development Programme's European Future Highly Mobile Augmented Armoured Systems and the European Defence Fund's, in which Arquus and Nexter were the beneficiaries. The Belgian company John Cockerill Defense[MS1], also a member of the FAMOUS consortium (and now owner of Arquus), will be a major subcontractor.

Through 2030, France expects to begin introducing the VBAE into service, with a fleet of 140 expected for the end of the decade. By 2035, the military should have 1,440 in service.

Website: <https://www.occar.int/our-work/programmes/vbae>

**ARMIS.** At Eurosatory 2020, Arquus launched the ARMIS family of military logistic trucks. Available in 4x4, 6x6, and 8x8 configurations, ARMIS vehicles offer both protected and unprotected cab options, accommodating a range of mission profiles.

These trucks are designed for versatility, with modular trailer payloads adaptable to various tasks. Applications include troop transport, equipment hauling, water carriage, mobile workshops, vehicle recovery, and more. ARMIS vehicles can also be equipped with remote weapon stations and automatic convoy systems for enhanced protection and operational efficiency.

**VT4.** In December 2016, the French Army awarded Renault Trucks Defense (now Arquus) a contract to supply 3,700 unprotected 4x4 light tactical vehicles to replace the aging Peugeot P4. Based on a militarized Ford Everest, the VT4 is designed for command and liaison roles, carrying up to five personnel. The EUR500 million contract was split equally between new vehicle procurement and maintenance. Deliveries of the initial Standard 1 VT4 variant began in October 2018.

A subsequent order for 1,200 VT4 Standard 2 vehicles, along with additional components, was placed in September 2018. This upgraded version features a pre-equipped communications package for enhanced operational capabilities in overseas deployments. Deliveries began in June 2019.

By July 2023 the delivery of a total of 4,380 VT4 vehicles (500 Standard 1 and 3,880 Standard 2) had been completed. These vehicles have been distributed to the French Army (3,980), Navy (40), Air Force (65), Armed Forces Fuel Service (40), and the Joint Munitions Service (20). The remainder were distributed to various support services such as the National Guard among others.

**Scarabee.** Arquus' Scarabee is a highly mobile 4x4 light armored vehicle designed for reconnaissance, scouting, and support roles. Accommodating up to four personnel, it can be configured for a variety of missions including tank guidance, quick reaction forces, anti-tank operations, and special forces tasks. A unique feature of the Scarabee is its independent rear wheel steering, enabling tight U-turns and unique crab-like movement. This exceptional maneuverability enhances its performance in complex terrains and urban environments.

In 2020, an electric variant of the Scarabee was introduced, offering increased stealth capabilities due to its silent operation. Powered by lithium batteries, this model is optimized for stealthy reconnaissance and attack missions.

**Fortress Mk2.** The Arquus Fortress Mk 2 is a 14.5-tonne 4x4 armored combat vehicle designed to transport a combat group of 11 soldiers. The vehicle features an armored monocoque hull, independent suspension, automatic transmission, and a six-cylinder 340-hp engine, which gives the Fortress Mk 2 a top speed of 120 km/h and a range of 1,200 kilometers (746 miles). The armored personnel carrier variant can be converted to ambulance and command post versions.

**Sherpa.** The Sherpa Light is a family of 4x4 tactical and light armored vehicles designed for tactical missions such as scouting, patrol, convoy escort and

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command and liaison. It is able to transport up to four or five soldiers or a total payload of up to 4 tonnes.

**Higuard.** The Higuard is a 6x6 MRAP (Mine Resistant Ambush Protected) vehicle designed from the chassis of the Renault Sherpa 5. Beyond its standard troop transport role, it can be configured for mission roles such as command and control, ambulance, protected cargo, internal security and road clearance. It has a maximum operating weight of 21 tonnes and can carry payloads of up to 4 tonnes.

**VLRA Series.** The VLRA series offers robust 4x4 and 6x6 truck configurations, spanning a weight range of 1.5 to 5.56 tonnes. The vehicle's enduring success hinges on its exceptional standardization, featuring

interchangeable parts and components across models. This design philosophy ensures easy maintenance and logistical efficiency, with parts remaining compatible even with vehicles manufactured decades ago. Core components such as cabs, structural elements, engines, and drivetrains maintain consistent designs throughout the VLRA family. All VLRA vehicles mount a Perkins 6.354.4 engine. This powerplant generates 89.5 to 138 kilowatts (120 to 185 hp). Some 14,000 vehicles are in service around the world according to manufacturer, Aquus.

The bewildering designation system is exact as to type and mission. The following are the most recently available variants of the VLRA:

<u>Description</u>	<u>Designations</u>
Troop/cargo carrier	TPK 4.15 SM3, TPK 4.30 SM3, TPK 4.35 SM3, TPK 4.36 SM3, TPK6.40SM3
Long-range patrol vehicle	TPK 4.15 FSP
Weapons carrier/rocket launcher	TPK 4.15 LRM
Light armored vehicle	TPK 4.20 BL
Firefighting vehicle	TPK 4.20 FFM, TPK 4.20 SPM, TPK 4.31 FFM, TPK 4.31 FPTL
Radio command post	TPK 4.20 PCR
Weapons carrier	TPK 4.20 PMB, TPK 6.41 VPC
Ambulance	TPK 4.20 SAM, TPK 4.25 SAM
2,500-liter tanker vehicle	TPK 4.20 SC, TPK 4.25 STL
Light recovery duty vehicle	TPK 4.20 SL7
2,000-kg shelter carrier	TPK 4.20 SM
Light armored personnel carrier	TPK 4.20 VBL
Command and transmission vehicle	TPK 4.20 VCT
Scout car	TPK 4.20 VPL2
Double-cabin troop carrier	TPK 4.21 SM3
Workshop body vehicle	TPK 4.25 F
Workshop vehicle	TPK 4.30 FAE, TPK 4.30 FAM, TPK 4.30 FMA1, TPK 4.30 FMA2, TPK4.30FME, TPK 4.30 FRA
Cargo truck	TPK 4.25 SH
RITA shelter carrier	TPK 4.25 SH/STL
Off-highway bus	TPK 4.30 SB, TPK 4.32 SB, TPK 4.33 SB
Mechanical handling vehicle	TPK 4.35 SCM
Convoy protection vehicle	TPK 4.35 VPC
Materials-handling vehicle	TPK 4.36 SCM
Drop-side cargo truck	TPK 4.36 STL, TPK 6.40 CTL, TPK 6.50 CTL
Heavy-duty fire tanker	TPK 6.35 FFL
Medium recovery vehicle	TPK 6.35 SL7
Tractor truck	TPK 6.35 TSR, TPK 6.35 TSR 3 EC
Tractor-tanker combination	TPK 6.35/SR 475, TPK 6.35/SR 475 FFGC
Decontamination vehicle	TPK 6.40 CSD
3-tonne tipper truck	TPK 6.40 SBG
4,500-liter tanker vehicle	TPK 6.40 SC
Tar spreader truck	TPK 6.40 SG
Shelter carrier vehicle	TPK 6.40 SH, TPK 6.41 SH, TPK 6.50 SH, TPK 6.60 SH
Temporary track layer	TPK 6.40 SPP
Recovery vehicle	TPK 6.40 SWT, TPK 6.40 WRT
Forest firefighting vehicle	TPK 6.41 FFL
Tipper truck	TPK 6.41 GBS
Recon and support vehicle	TPK 6.50 SM3

**ALTV Series.** The ACMAT 4x4 Light Tactical Vehicle (ALTV) has been on the market as a budget alternative

since 2008. It is based on the Nissan Navara platform and has a payload of 1.4 to 3.5 tonnes, depending on the

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version. The ALTV series is designed as a cost-effective and highly adaptable light tactical vehicle and is capable of performing in a wide array of roles, including transport and surveillance and reconnaissance missions, and can even operate as an armored weapon station.

ALTV series vehicles mount an unspecified 140-kW (190-hp) turbo-diesel engine. The ALTV is available in different versions, including the two-door (ALTV PICKUP 2), four-door (ALTV PICKUP 4), ALTV Torpedo open-cab version, ALTV PROTÉGÉ/Protected vehicle, ALTV Check Point, ALTV MID CITY (civil security), ALTV Station Wagon, ALTV Ambulance, and ALTV Transport.

### *KNDS*

**TITUS.** In September 2013, Nexter Systems unveiled its new armored wheeled vehicle, the Tactical Infantry Transport & Utility System. TITUS, based on a Tatra Truck 817 chassis, is a new generation of 6x6 armored vehicle personnel carrier. Variants include target acquisition, command post, ambulance, and self-propelled 120mm mortar vehicles as well as urban area, mobility support and recovery, and resupply vehicles. Nexter designed TITUS primarily for export markets in the Middle East and Asia.

In July 2019, the Czech Ministry of Defense signed a contract for TITUS to fulfill its requirement of 42 MRAP vehicles. The program is valued at CZK2.7 billion (\$111 million). The vehicles will be manufactured and assembled at the Tatra Trucks production facility in Koprivnice, with deliveries to run through 2023.

Titus Homeland is a variant of the TITUS that has been configured for security and police forces.

### *Thales*

**Hawkei.** The Hawkei is a 10-tonne 4x4 protected mobility vehicle originally designed to meet an Australian Defence Force requirement for a light armored patrol vehicle to replace some of its Land Rovers. The vehicle carries a 3-tonne payload and provides seating for up to five occupants in the four-door variant or up to three occupants in the two-door variant. The 268-hp twin-turbo diesel engine gives the vehicle a top speed of 115 km/h and a range of 600+ kilometers (373+ miles). Roles include troop movement, command and control, electronic warfare, liaison, surveillance, and reconnaissance.

In October 2015, Thales Australia received final approval for the delivery of 1,100 Hawkei vehicles. The contract was valued at EUR820 million and fulfills the Australian Department of Defence's LAND 121 Phase 4 – Protected Mobility Vehicle (Light) (PMV-L) program

to replace the Army's 1,300-strong Land Rover fleet with protected vehicles. In addition to the vehicles, 1,000 trailers were produced as part of the contract. Thales Australia's Hawkei team, which included Boeing Defence Australia, PAC Group, and Plasan, was downselected for the program in December 2011 over competing offers from Force Protection Europe and General Dynamics Land Systems. The vehicle entered full-rate production in Australia in September 2020.

### *Soframe*

**ARIVE.** Soframe's Armoured Infantry Vehicle (ARIVE) is a 4x4 armored vehicle, weighing in at 14.5 tonnes and capable of transporting a crew of 10 to 12 personnel. The ARIVE is available in several versions: personnel carrier, command post, and ambulance. According to Soframe, around 2,000 ARIVE vehicles are currently in active service.

In 2021, a variant of the ARIVE, dubbed Centaur, was selected to fulfill the Armored Crowd Control Vehicle (VBMO) requirement for Gendarmerie units across France. In a contract awarded in November 2021, SOFRAME secured a deal worth between EUR65 million and EUR70 million to supply the French Gendarmerie with 90 of these state-of-the-art armored vehicles.

**Sakahr.** In 2024, Soframe introduced a 19-tonne (MRAP) vehicle. Built on the Tatra 815 4x4 chassis, it boasts a 2.5-ton payload capacity and can transport a crew of two and eight passengers.

**PPLOG – Multi-Purpose Logistic Carrier.** The PPLOG is an 8x8 logistic transport vehicle which can be armored. The PPLOG and its trailer (RLOG) form a whole: truck, trailer, and flat racks. Together, they form the French army's Army's latest latest-generation logistic convoy, PPLOG/R, widely used in France and abroad.

**Light APCs.** Soframe produces two light vehicles, the CLV and APCL.

CLV. The Command and Liaison Vehicle is a protected, all-terrain pickup truck designed for command and control roles. Its armored cab accommodates a crew of four, while the rear bed offers 3 square meters of space for customizable mission equipment.

APCL. Designed for rapid intervention in challenging terrain, the Armored Personal Carrier Light 4x4 offers adaptable armor protection. Capable of carrying up to eight personnel, it is ideal for operations in densely vegetated or rugged environments.

**Special Forces Vehicles.** Soframe also produces several vehicles designed for special forces operations.

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**OUTFIELDER** – Light Rapid Intervention Vehicle. The OUTFIELDER is a 4x4 vehicle optimized for rapid deployment in intelligence and infiltration missions. Its design can be adapted to numerous configurations.

**VENPIR** – Medium Rapid Intervention Vehicle. The VENPIR is a protected 4x4 vehicle designed for rapid response operations. Equipped with Level 1 mine protection, it offers a secure platform for personnel and equipment. The VENPIR's modular design allows for customization, with various mission-specific options available, including communication and jamming systems.

**FSZ** – Special Forces Zetros. The FSZ is an all terrain multirole truck available in 4x4 or 6x6 configurations. Designed for special forces operations, it provides exceptional mobility and can be customized to suit a wide range of missions.

**HE 441**. Introduced in 2024, the HE 441 is a convertible all-terrain vehicle suitable for both military and civilian use. With a gross vehicle weight of 2.2 tons, it can accommodate up to three occupants. Designed for adaptability, the HE 441 is equipped with interfaces to integrate sensors, modules, and navigation software, paving the way for semi-autonomous or fully autonomous operation.

## Funding

The French Ministry of Defense funds the procurement of wheeled tactical vehicles for French forces. The individual contractors generally funded the development of these vehicles as private ventures.

## Worldwide Distribution/Inventories

**Export Potential.** French tactical vehicles are in service worldwide. As the following list suggests, distribution of French tactical vehicles extends beyond the traditional African and Middle Eastern clients for French military hardware. This trend will likely continue throughout the forecast period.

**Countries.** Countries that maintain French tactical vehicles in their inventories include **Algeria, Argentina, Austria, Bangladesh, Belgium, Benin, Burkina Faso, Burundi, Cameroon, the Central African Republic, Chad, the People's Republic of China, Congo, the Democratic Republic of the Congo, Djibouti, Egypt, Equatorial Guinea, France, Gabon, Gambia, Iran, Iraq, Ireland, Ivory Coast, Jordan, Laos, Lebanon, Madagascar, Mali, Mauritania, Morocco, Namibia, Niger, Portugal, Qatar, Saudi Arabia, Senegal, the Somali Republic, Spain, Syria, Togo, Tunisia, the United Arab Emirates, and Vietnam.**

## Forecast Rationale

France has significantly ramped up defense spending in recent years, driven by escalating geopolitical tensions. A key component of this investment is the modernization of its military vehicle fleet. The country is actively replacing aging vehicles, often decades old, with advanced models equipped with enhanced protection, communication systems, and autonomous capabilities.

The Military Programming Law (LPM) 2024-2030 outlines a comprehensive plan to address military shortcomings exposed by the Ukraine conflict. While primarily focused on major weapon systems and ammunition stockpiling, the LPM also prioritizes logistics vehicles. A target of acquiring 2,086 utility trucks by 2024, with a total of 9,466 by 2035, underscores the government's commitment to this area.

Arquus, a leading French tactical vehicle producer, is poised to play a pivotal role in this modernization effort. Through the consolidation of numerous domestic

vehicle producers, Arquus has established itself as a primary supplier to the French Armed Forces, solidifying its position in the domestic market.

In addition, owing to France's lasting influence as a former colonial power, its close political and economic relationship with much of the developing world has proven vital to sustaining the French tactical vehicle industry through lean times. With tensions around the world growing, the international export market will be another avenue of growth for French tactical vehicle manufacturers.

In particular, the African and Middle Eastern markets remain ripe as a source of modest, but recurrent, sales opportunities.

In the past, tactical vehicle programs would be started with the best of intentions only to fall to more glamorous weapon systems, like ships and aircraft. However, in this current heated environment, steady production of various tactical logistic vehicles is

### French Tactical Vehicles

expected throughout the forecast period. Without a robust logistical infrastructure, even the most well-equipped forces can falter.

The forecast assumes that France will move ahead with its military vehicle procurement goal to acquire some 9,500 vehicles by 2035, as outlined in LPM 2024-2030, and keep it at a steady pace throughout the period.

### Ten-Year Outlook

ESTIMATED CALENDAR YEAR UNIT PRODUCTION												
Designation or Program	High Confidence					Good Confidence			Speculative			Total
	Thru 2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	
MFR Varies												
<b>French Tactical Vehicles (Misc)</b>												
	0	200	600	700	800	900	900	900	900	900	900	7,700
<b>Total</b>	0	200	600	700	800	900	900	900	900	900	900	7,700