

The Market for Light Tracked Vehicles 2019-2028



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 - Calculations of projected manufacturer market shares by units and value
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FI's Market Segment Analyses are updated annually, making them indispensable tools for evaluating market potential. Each Market Segment Analysis identifies key growth opportunities, strategic partners, and merger & acquisition targets. What's more, key trends and critical developments are closely tracked to keep you fully up to date on market opportunities.

As an added benefit, the Complete Data Package is neatly presented in an elegant zipper case that is ideally suited for executive presentations.

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Market for Light Tracked Vehicles

Executive Summary

Governments worldwide continue to reduce defense expenditures, including budgets for light tracked vehicles. However, the Forecast International Weapons group believes that the start of low-rate initial production of the BAE Systems Armored Multi-Purpose Vehicle for the U.S. Army will single-handedly shake up the market for light tracked vehicles.

We forecast that the market will produce more than 4,800 light tracked vehicles, worth over \$13.26 billion, over the next decade.

Enter the AMPV

With the demise of the Ground Combat Vehicle, the Armored Multi-Purpose Vehicle has become the U.S. Army's most significant new armored fighting vehicle. The AMPV is a non-developmental family of vehicles that will begin replacing the Army's geriatric M113 armored personnel carrier fleet.

The Army intends for the AMPV to ultimately account for approximately 30 percent of the Armored Brigade Combat Team's tracked fleet. The Army currently holds a procurement objective of 2,897 AMPVs in five variants.

We expect the AMPV program to account for at least 31 percent of all new light tracked vehicle production worldwide, worth 47.18 percent of the market, from 2018-2027.

With the AMPV program, BAE Systems stands as the leading contractor in the international market for light

tracked vehicles. Including the AMPV, we expect BAE Systems to secure 36.03 percent of all new light tracked vehicle production worldwide, worth 49.84 percent of the market, over the decade 2018-2027.

PRC: No Longer the Dominant Player

With the entry of the AMPV, the People's Republic of China is no longer the most prolific light tracked vehicle producer in terms of output. We expect that combined production of the ZBD2000 and ZBD97 will account for 18.18 percent of all new light tracked vehicle production worldwide, worth 4.73 percent of the market, over the next decade.

Since the AMPV entered the market, Chinese light tracked vehicles have lost over 33.7 percent of their market share of production

Igel/Puma: No Longer the Dominant Value

The People's Republic of China is not the only player in this market to lose its market dominance to the AMPV. Germany's Igel/Puma slips to the second most valuable light tracked vehicle program on the international market. Contributing 6.43 percent of new vehicle production, the Igel/Puma program will now account for 26.86 percent of the total market value from 2018-2027.

Thus, the entry of the AMPV into the market has cost the Igel/Puma program over 51.2 percent of its market share of value.

* * *

PROGRAMS

The following reports are included in this section: (**Note:** a single report may cover several programs.)

AAV7/LVTP7
Armored Infantry Fighting Vehicle
BMD-3 / BMD-4
BMP-3
Boragh
Bradley Fighting Vehicle/Armored Multi-Purpose Vehicle (AMPV)
Chinese Tracked Mechanized Infantry Combat Vehicles
Dardo (Veicolo Corazzato de Combattimento-80)
FV101 Scorpion
Igel/Puma
Korean Infantry Fighting Vehicle
M113
Stridsfordon 90 (CV90)
Ulan/Pizarro/ASCOD MICV/Ajax
Wiesel
ZBD97
ZBD2000

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