

Report Content

Chapter 1	Research Methodology and Scope	12
1.1	Scope and definition	12
1.1.1	Scope	12
1.1.2	Definitions	12
1.2	Research design	14
1.2.1	Data collection techniques	15
1.2.2	Market size estimation	16
1.2.3	Forecasting model	21
1.3	Data sources	22
1.3.1	Secondary	22
1.3.1.1	Paid sources	22
1.3.1.2	Public sources	22
1.3.2	Primary	23
Chapter 2	Executive Summary	24
2.1	Ground military vehicle electrification market, 2023-2032	24
2.2	Business trends	24
2.3	Regional trends	26
2.4	Platform trends	28
2.5	System trends	29
2.6	Technology trends	31
2.7	Mode of operation trends	32
2.8	Voltage type trends	34
Chapter 3	Ground Military Vehicle Electrification Industry Insights	36
3.1	Ground military vehicle electrification industry ecosystem analysis	36
3.1.1	Raw material suppliers	36
3.1.2	Component manufacturers	37
3.1.3	System integrators	38
3.1.4	Vehicle manufacturers	38
3.1.5	Technology providers	39
3.1.6	End-user	39
3.1.7	Vendor matrix	40
3.1.8	Profit margin analysis	41
3.2	Technology and innovation landscape	41
3.2.1	Advancements in battery technology and energy storage solutions	41
3.2.2	Integration of autonomous technologies	42
3.3	Patent analysis	43
3.4	Key news & initiatives	45
3.5	Regulatory landscape	46
3.5.1	International standards	46
3.5.1.1	IEC 61508	46
3.5.1.2	IEEE 2700-2017 - IEEE Standard for Sensor Performance	46

3.5.2	North America	46
3.5.2.1	DOD Directive 5000.01.....	46
3.5.2.2	Federal Motor Vehicle Safety Standards (FMVSS).....	46
3.5.2.3	Military Vehicle Fleet Electrification Act	47
3.5.3	Europe	47
3.5.3.1	Regulation (EU) 2019/631.....	47
3.5.3.2	EU REACH	47
3.5.4	Asia Pacific	47
3.5.4.1	Japan Electronics and Information Technology Industries Association (JEITA)	47
3.5.4.2	KC Certification, South Korea	48
3.5.4.3	CCC certification.....	48
3.6	Industry impact forces	48
3.6.1	Growth drivers	49
3.6.1.1	Technological advancements in battery technology	49
3.6.1.2	Rising fuel efficiency and cost savings	49
3.6.1.3	Enhanced operational capabilities.....	50
3.6.1.4	Government policies and environmental regulations.....	51
3.6.1.5	Strategic advantages and energy independence	52
3.6.2	Pitfalls & challenges	52
3.6.2.1	High initial costs and investment requirements.....	52
3.6.2.2	Limited range and charging infrastructure	53
3.7	Growth potential analysis, 2023	54
3.8	Porter's analysis	55
3.9	PESTEL analysis	56
Chapter 4	Competitive Landscape, 2023	57
4.1	Introduction	57
4.2	Company market share, 2023	58
4.3	Competitive analysis of the key market players	58
4.3.1	BAE Systems	59
4.3.2	Rheinmetall AG	60
4.3.3	General Dynamics Corporation	61
4.3.4	Oshkosh Corporation	62
4.3.5	GM Defense LLC	62
4.3.6	Leonardo S.p.A.	63
4.3.7	Textron Inc.	64
4.4	Competitive positioning matrix	65
4.5	Strategic outlook matrix	67
Chapter 5	Ground Military Vehicle Electrification Market, By Platform	68
5.1	Ground military vehicle electrification market share, by platform, 2023 & 2032	68
5.2	Combat vehicles	68
5.3	Support vehicles	69
5.4	Unmanned armoured vehicles	71

Chapter 6	Ground Military Vehicle Electrification Market, By System	72
6.1	Ground military vehicle electrification market share, by system, 2023 & 2032	72
6.2	Power generation	72
6.3	Cooling systems	73
6.4	Energy storage.....	74
6.5	Traction drive systems/propulsion systems.....	75
6.6	Power conversion.....	76
6.7	Transmission system	77
Chapter 7	Ground Military Vehicle Electrification Market, By Technology.....	78
7.1	Ground military vehicle electrification market share, by technology, 2023 & 2032	78
7.2	Hybrid	78
7.3	Fully electric.....	79
Chapter 8	Ground Military Vehicle Electrification Market, By Mode of Operation	81
8.1	Ground military vehicle electrification market share, by mode of operation, 2023 & 2032	81
8.2	Manned.....	81
8.3	Autonomous/semi-autonomous	82
Chapter 9	Ground Military Vehicle Electrification Market, By Voltage Type	84
9.1	Ground military vehicle electrification market share, by voltage type, 2023 & 2032.....	84
9.2	Low voltage (less than 50 V)	84
9.3	Medium voltage (less than 50 -600 V)	85
9.4	High voltage (more than 600 V).....	86
Chapter 10	Ground Military Vehicle Electrification Market, By Region	87
10.1	Ground military vehicle electrification market share, by region, 2023 & 2032	87
10.2	North America.....	87
10.3	Europe.....	89
10.4	Asia Pacific	92
10.5	Latin America	94
10.6	MEA.....	96
Chapter 11	Company Profiles	98
11.1	Allison Transmission	98
11.1.1	Business overview.....	98
11.1.2	Financial data.....	98
11.1.3	Product landscape	99
11.1.4	Strategic outlook	100
11.1.5	SWOT analysis	100
11.2	AM General	101
11.2.1	Business overview.....	101
11.2.2	Financial data.....	101
11.2.3	Product landscape	101
11.2.4	SWOT analysis	102
11.3	Arquus Defence	103
11.3.1	Business overview.....	103

11.3.2	Financial data.....	103
11.3.3	Product landscape	103
11.3.4	Strategic outlook	104
11.3.5	SWOT analysis	104
11.4	BAE Systems.....	105
11.4.1	Business overview.....	105
11.4.2	Financial data.....	105
11.4.3	Product Landscape.....	106
11.4.4	SWOT Analysis	107
11.5	Collins Aerospace	108
11.5.1	Business overview.....	108
11.5.2	Financial data.....	108
11.5.3	Product landscape	109
11.5.4	SWOT analysis	109
11.6	FNSS	110
11.6.1	Business overview.....	110
11.6.2	Financial data.....	110
11.6.3	Product landscape	110
11.6.4	Strategic outlook	111
11.6.5	SWOT analysis	111
11.7	Gallay Ltd.....	112
11.7.1	Business Overview	112
11.7.2	Financial data.....	112
11.7.3	Product Landscape.....	112
11.7.4	SWOT analysis	113
11.8	General Dynamics Corporation	114
11.8.1	Business overview.....	114
11.8.2	Financial data.....	114
11.8.3	Product landscape	115
11.8.4	SWOT analysis	116
11.9	GM Defense LLC.....	117
11.9.1	Business Overview	117
11.9.2	Financial Data	117
11.9.3	Product Landscape.....	118
11.9.4	Strategic Outlook.....	118
11.9.5	SWOT Analysis	119
11.10	Highland Systems.....	120
11.10.1	Business overview.....	120
11.10.2	Financial data.....	120
11.10.3	Product landscape	120
11.10.4	SWOT analysis	121
11.11	Leonardo S.p.A	122
11.11.1	Business overview.....	122

11.11.2	Financial data.....	122
11.11.3	Product landscape	123
11.11.4	SWOT Analysis	124
11.12	Milrem Robotics	125
11.12.1	Business overview.....	125
11.12.2	Financial data.....	125
11.12.3	Product landscape	125
11.12.4	Strategic outlook	126
11.12.5	SWOT analysis	126
11.13	Nexter (KNDS).....	127
11.13.1	Business overview.....	127
11.13.2	Financial data.....	127
11.13.3	Product landscape	127
11.13.4	SWOT analysis	128
11.14	Oshkosh Corporation	129
11.14.1	Business Overview	129
11.14.2	Financial Data	129
11.14.3	Product Landscape.....	130
11.14.4	Strategic Outlook.....	131
11.14.5	SWOT Analysis	131
11.15	Otokar Otomotiv ve Savunma Sanayi AS	132
11.15.1	Business overview.....	132
11.15.2	Financial data.....	132
11.15.3	Product landscape	133
11.15.4	Strategic outlook	133
11.15.5	SWOT Analysis	133
11.16	Polaris Inc.	134
11.16.1	Business overview.....	134
11.16.2	Financial data.....	134
11.16.3	Product landscape	135
11.16.4	Strategic outlook	135
11.16.5	SWOT Analysis	136
11.17	QinetiQ	137
11.17.1	Business Overview	137
11.17.2	Financial Data	137
11.17.3	Product Landscape.....	138
11.17.4	Strategic Outlook.....	138
11.17.5	SWOT Analysis	139
11.18	Rheinmetall AG	140
11.18.1	Business Overview	140
11.18.2	Financial Data	140
11.18.3	Product Landscape.....	141
11.18.4	Strategic Outlook.....	142

11.18.5	SWOT Analysis	142
11.19	ST Engineering	143
11.19.1	Business Overview	143
11.19.2	Financial Data	143
11.19.3	Product Landscape.....	144
11.19.4	Strategic Outlook.....	144
11.19.5	SWOT Analysis	145
11.20	Textron Inc.	146
11.20.1	Business Overview	146
11.20.2	Financial Data	146
11.20.3	Product Landscape.....	147
11.20.4	Strategic Outlook.....	147
11.20.5	SWOT Analysis	148
11.21	Thales Group	149
11.21.1	Business overview	149
11.21.2	Financial data.....	149
11.21.3	Product Landscape.....	150
11.21.4	Strategic Outlook.....	151
11.21.5	SWOT Analysis	152

Data Tables

TABLE 1	Ground military vehicle electrification market revenue, by company, 2023 (USD Million)	18
TABLE 2	Sources, by region	22
TABLE 3	Global ground military vehicle electrification market, 2021-2023 (USD million)	25
TABLE 4	Global ground military vehicle electrification market, 2024–2032 (USD million)	25
TABLE 5	Global ground military vehicle electrification market, by region, 2021-2023 (USD million)	27
TABLE 6	Global ground military vehicle electrification market, by region, 2024-2032 (USD million)	27
TABLE 7	Global ground military vehicle electrification market, by platform, 2021 - 2023 (USD Million)	29
TABLE 8	Global ground military vehicle electrification market, by platform, 2024 - 2032 (USD Million)	29
TABLE 9	Global ground military vehicle electrification market, by system, 2021-2023 (USD million)	30
TABLE 10	Global ground military vehicle electrification market, by system, 2024-2032 (USD million)	31
TABLE 11	Global ground military vehicle electrification market, by technology, 2021-2023 (USD million)	32
TABLE 12	Global ground military vehicle electrification market, by technology, 2024-2032 (USD million)	32
TABLE 13	Global ground military vehicle electrification market, by mode of operation, 2021-2023 (USD million)	33
TABLE 14	Global ground military vehicle electrification market, by mode of operation, 2024-2032 (USD million)	33
TABLE 15	Global ground military vehicle electrification market, by voltage type, 2021-2023 (USD million)	35
TABLE 16	Global ground military vehicle electrification market, by voltage type, 2024-2032 (USD million)	35
TABLE 17	Competitive analysis of prominent market players	59
TABLE 18	Competitive positioning matrix: Classification criteria	65
TABLE 19	Strategic outlook matrix: Classification criteria	67
TABLE 20	North America ground military vehicle electrification market, by country, 2021-2023 (USD Million)	88
TABLE 21	North America ground military vehicle electrification market, by country, 2024-2032 (USD Million)	88
TABLE 22	Europe ground military vehicle electrification market, by country, 2021-2023 (USD Million)	90
TABLE 23	Europe ground military vehicle electrification market, by country 2024-2032 (USD Million)	92

TABLE 24	Asia Pacific ground military vehicle electrification market, by country, 2021-2023 (USD Million)	93
TABLE 25	Asia Pacific ground military vehicle electrification market, by country, 2024-2032 (USD Million)	94
TABLE 26	Latin America ground military vehicle electrification market, by country, 2021-2023 (USD Million)	95
TABLE 27	Latin America ground military vehicle electrification market, by country, 2024-2032 (USD Million)	95
TABLE 28	MEA ground military vehicle electrification market, by country, 2021-2023 (USD Million)	97
TABLE 29	MEA ground military vehicle electrification market, by country, 2024-2032 (USD Million)	97

Charts & Figures

FIG. 1	Research design	14
FIG. 2	Data collection techniques	15
FIG. 3	Primary research process	16
FIG. 4	Market sizing approach	17
FIG. 5	Primary respondents	19
FIG. 6	Forecasting model	21
FIG. 7	Ground military vehicle electrification 360° synopsis, 2023-2032	24
FIG. 8	Ground military vehicle electrification industry ecosystem analysis	36
FIG. 9	Profit margin analysis	41
FIG. 10	Countries with the highest military spending worldwide in 2023 (in USD Billion)	51
FIG. 11	Growth potential analysis, 2023	54
FIG. 12	Porter's analysis	55
FIG. 13	PESTEL analysis	56
FIG. 14	Company market share, 2022	58
FIG. 15	Competitive analysis of key market players	58
FIG. 16	Competitive positioning matrix	65
FIG. 17	Strategic outlook matrix	67
FIG. 18	Ground military vehicle electrification market share, by platform, 2023 & 2032	68
FIG. 19	Ground military vehicle electrification market share, by system, 2023 & 2032	72
FIG. 20	Ground military vehicle electrification market share, by technology, 2023 & 2032	78
FIG. 21	Ground military vehicle electrification market share, by mode of operation, 2023 & 2032	81
FIG. 22	Ground military vehicle electrification market share, by voltage type, 2023 & 2032	84
FIG. 23	Ground military vehicle electrification market share, by region, 2023 & 2032	87
FIG. 24	SWOT Analysis, Allison Transmission	100
FIG. 25	SWOT analysis, AM General	102
FIG. 26	SWOT analysis, Arquus Defence	104
FIG. 27	SWOT Analysis, BAE Systems	107
FIG. 28	SWOT analysis, Collins Aerospace	109
FIG. 29	SWOT analysis, FNSS	111
FIG. 30	SWOT Analysis, Gallay Ltd	113
FIG. 31	SWOT analysis, General Dynamics Corporation	116
FIG. 32	SWOT Analysis, GM Defense LLC	119
FIG. 33	SWOT analysis, Highland Systems	121
FIG. 34	SWOT Analysis, Leonardo S.p.A.	124
FIG. 35	SWOT analysis, Milrem Robotics	126

FIG. 36	SWOT analysis, Nexter (KNDS)	128
FIG. 37	SWOT Analysis, Oshkosh Corporation	131
FIG. 38	SWOT Analysis, Otokar Otomotiv ve Savunma Sanayi AS	133
FIG. 39	SWOT Analysis, Polaris Inc.	136
FIG. 40	SWOT Analysis, Qinetiq	139
FIG. 41	SWOT Analysis, Rheinmetall AG	142
FIG. 42	SWOT Analysis, ST Engineering	145
FIG. 43	SWOT Analysis, Textron Inc.	148
FIG. 44	SWOT Analysis, Thales Group	152