

International Armoured Vehicles 2022 Market Report

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Defence **iQ**



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GLOBAL MILITARY ARMoured VEHICLE MARKET

The Global Military Armoured Vehicle Market is expected to grow to over £30 Billion annually by 2027. The cumulative market is valued at \$250 Billion over the next 10 years.

This Asian market is forecast to account for more than 30% of the total market. Increasing defence spending, coupled with many countries now pursuing indigenous programmes is driving growth in this region.

Armoured Vehicle Survivability and Weapons are also key market growth areas. The key area of focus in the Armoured Personnel Carrier is to reduce the exposure of the gunner to enemy fire. The remotely operated weapon is also becoming a standard fit for these vehicles.

The top three countries with the largest armoured vehicle fleets are still Russia, China and U.S.A. The Armoured Personnel Carrier (APC) accounts for the biggest share of the total fleet.

However, the largest evolution of the Armoured Vehicle Market is the slow transformation from Passive Armour to Active Protection Systems (APS). The APS was historically used predominantly on MBTs; however the effectiveness of the system is extending its adoption to the APC segment as well.



COUNTRY-BY-COUNTRY PROGRAMMES AND REQUIREMENTS

EUROPE



Austria

Another 16 Dingo 2s are scheduled to be delivered in 2022. 66 are currently in service.



Belgium

60 Jaguar and 382 Griffon armoured vehicles are being procured from France in a \$1.72 Billion agreement. They are planned to enter service between 2025 and 2030. 322 JLTVs were also ordered from the U.S.A in September 2020, in a \$135 million deal.



Bulgaria

In 2018 the Bulgarian government announced its intent to procure a new 8x8 Mechanised Infantry Vehicle to replace the legacy BTR60-PB fleet.

At the start of October 2020 the tender bids from the two remaining of four companies competing for the Bulgarian 8x8 armoured vehicle requirement were opened and shortly afterwards, it was reported that GDELS and Patria had been down-selected for Phase 2 evaluation and the other two companies had been unsuccessful.

On Monday 5th October Finnish manufacturer Patria announced that their AMV-XP (Armoured Modular Vehicle – XP) was one of the pair of 8x8 multi-role armoured vehicles selected by the Bulgarian MoD. Spanish-based GDELS (General Dynamics European Land Systems) was the second manufacturer chosen.



Czech Republic

Testing of IFV contenders for the Czech Army programme has taken place, marking another step in the progress of the acquisition project that had looked vulnerable to cancellation as recently as last year.

The Army of the Czech Republic has initiated tests of three tracked infantry fighting vehicles (IFVs) on the 26th April that concluded on the 6th June.

Participants include the Ascod from General Dynamics European Land Systems, the Rheinmetall KF41 Lynx and the BAE Systems CV90.

The Czech MoD has indicated that although the vehicles are undergoing an assessment, an evaluation of the contractors' offers will not take place just yet.



Denmark

A mid-life upgrade for the Leopard 2A5 to Leopard 2A7 Main Battle tanks is planned. 44 Leopards are in service.

The first Piranha 5 and Eagle 5 armoured wheeled vehicles were delivered to the Royal Danish Army in March 2019.

GDELS signed a contract at the end of 2015 to deliver 309 Piranha 8x8 Armoured Personnel Carriers in six variants: infantry, command, ambulance, engineer, mortar and repair. Two years later, GDELS was awarded a framework supply contract for the delivery of multiple variants of the new EAGLE 4x4 vehicle. The first batch of 36 vehicles was in the Armoured Patrol Vehicle configuration.



Estonia

The Estonian Government's 2017-2026 National Defence Development Plan (NDDP) identifies the need for armoured mobility and firepower. Currently, CV9035EEs, XA-180 and XA-188s are in service.



Finland

BAE Systems has signed a contract with Finland to extend the CV90's capabilities into the 2030s.

The contract is valued at up to \$32million with options and includes a mid-life extension programme to increase the vehicle's combat efficiency for the future battlefield.

The upgrades will be carried out between 2022-2026.

The contract will focus on upgrading the general availability and maintainability of the vehicle, further developing in-service safety and enhancing the system's technology and software.



France

The French Army is proceeding with the Scorpion (Synergie du contact renforcé par la polyvalence et l'info valorisation) programme, that will totally re-shape how it will conduct military operations and requires the acquisition of new combat systems.

New French Armour programmes will run until 2035 and will include the delivery of the first Main Ground Combat System (MGCS), the next generation Franco-German tank that will replace the Leclerc in French Army service.

The Leclerc remains at the pinnacle of current French armour. To remain in service through to 2035 it was necessary to upgrade the Leclerc with Nexter being awarded a contract to upgrade 200 tanks to the Leclerc XL configuration.

As of 2021, 222 Leclerc tanks were in service. The plan is to have upgraded 122 to the Leclerc configuration by 2025, with the rest of the fleet completing the upgrade over the following three or so years. As the programme timetables that were generated before the Covid-19 outbreak, they are now be considered uncertain.

One of the legacy systems to be replaced is the AMX-10RC that was originally built by Nexter and entered service during the 1980s. Nexter was awarded a contract to upgrade 256 AMX-10RC vehicles to the AMX-10RCR configuration in 2000. The first upgraded vehicles were delivered to the French Army in 2005 and the programme completed in 2010. Currently the French Army has 245 AMX-10s in the inventory.

The ERC-90 Sagaie produced by Panhard (a legacy company of Arquus) is a 6×6 vehicle that is roughly half of the weight of the AMX-10RC and is equipped with a 90 mm gun. There are currently some 40 ERC-90 vehicles in service with the French Army.

The successor vehicle to the AMX-10RC and the ERC-90 is the Engin Blindé de Reconnaissance et de Combat (EBRC) Jaguar.

Apart from replacing the AMX-10RC and the ERC-90, the Jaguar will also replace the version of the VAB vehicle equipped with the HOT anti-tank missile system. There are currently 300 Jaguars on order and the plan is to have 150 delivered by 2025.

The Nexter VBCI wheeled IFV will also come under the umbrella of the Scorpion programme. There are currently some 605 of these in service with the French Army. The intention is to put these vehicles through an upgrade programme as they have an important role to play in the French Army structure and have plenty of operational life remaining.

Another new system being acquired is the Véhicule Blindé Multi-Rôles (VBMR) Griffon. This is a 6×6 vehicle and will eventually replace the VAB in French service; at present, there are 2,288 VABs with the French Army, with this number set to be reduced to 1,545 by 2025.

The Direction Générale de l'Armement (DGA) procurement agency placed the first Griffon order for 319 vehicles in April 2017; the first vehicles were delivered to the French Army in 2019, and over 220 vehicles are now in service. The plan for 2025 is to have 936 Griffons in service.

In total 1,872 Griffons are to be acquired by France in multiple variants. More recently, in December 2019, the contract for the mortier embarqué pour l'appui au contact (MEPAC) system was awarded by the DGA, which consists of a Thales 120 mm 2R2M mortar mounted on a variant of the Griffon. In total 54 systems have been ordered, the first will be delivered in 2023, with the remainder delivered between 2024 and 2027.

The other major in-production armoured vehicle programme for the French Army is the Véhicules Blindés Multi-Rôles (VBMR) Léger Serval, being produced by Nexter and Texelis. In total 2,038 Serval vehicles are to be acquired in three different versions and 16 separate variants. The first order placed by the DGA covered the acquisition of 636 vehicles under a contract announced in February 2018. By 2025 the French Army plans to have 489 Servals in service.

Also to be acquired under the Scorpion programme is the replacement for the Engin Blindé du Génie (EBG) armoured engineer vehicle. The new system known as the MAC will be on a wheeled platform and is described as an engineer combat support vehicle. Some 100 systems are expected to be acquired.

The Panhard VBL is operated by the French Army as a reconnaissance and liaison platform. Currently some 1,418 VBLs are in service. Arquus is presently putting large numbers of VBL through the Ultima refurbishment and upgrade programme, with the objective being that the VBL fleet in 2025 will consist of 733 Ultima variants out of 1,387 in service.

Under the Scorpion programme there is a requirement to replace the VBL with a successor vehicle known as the Véhicule Blindé d'Aide à l'Engagement (VBAE) which should enter service around 2025.

The innovative Arquus Scarabee vehicle could provide the basis for an answer to the French Army Véhicule Blindé d'Aide à l'Engagement (VBAE) requirement for a reconnaissance and liaison platform to replace the VBL in French Army service.

The VBAE will be a 4×4 in the eight to ten ton range; multiple vehicle variants are envisaged and the aim is to have a higher level of protection than the current VBL.

French manufacturer Arquus has indicated that its Scarabée armoured vehicle has left the development stage and is ready for the global market.

Arquus, formerly known as Renault Trucks Defence, supplies 90 percent of the French Army's wheeled vehicles and is one of the three partners, together with Nexter and Thales, developing the Griffon and Jaguar armoured vehicles that are the cornerstone of the French Army's Scorpion modernization programme.

The rear wheels of the Scarabée provide independent steering so that it can not only make very tight U-turns (11m, or 36 feet) but, as the rear axle can be kept parallel to the front one in a turn, it can move simultaneously forward and sideways like a crab.

This unique capability means the vehicle can surge from cover and back again without having to manoeuvre and can also keep facing the enemy whilst moving sideways, according to the manufacturer.

The company is also preparing a hybrid version of the Griffon for next year.

The French Army also wants to improve the survivability of its new Scorpion series of armoured vehicles with Active Protection Systems under its Prometheus programme.

The Prometheus (PROtection Multi Effets Terrestre Unifiée pour Scorpion) programme is developing the Diamant Active Protection Systems (APS) for installation on the French Army's new Griffon armoured vehicle. Under Prometheus, Thales will evaluate the system on the Griffon in 2022.

The company has been developing the Diamant APS since the early 2000s with the support of the French DGA procurement organisation. It has been designed to protect the series of vehicles built under the Scorpion armoured vehicle programme including Serval and Jaguar, as well as VBCI.



Germany

The German Bundeswehr is pushing ahead with the upgrade of its entire inventory of 334 Puma IFVs as it heads towards the development of a new armoured division.

Work has started on an upgrade to the German Armed Forces fleet of Puma Infantry Fighting Vehicles (IFVs) upgraded to a new S1 standard to prepare them for high-intensity conflict.

German company Rheinmetall has initiated the upgrade programme following a contract award worth €1.04 billion (\$1.23 billion) signed on the 28th June 2021 between the JV company PSM (a Rheinmetall/KMW 50:50 consortium) and defence procurement agency BAAINBw. The order is for an initial batch of 154 vehicles.

German defence officials expect to sign up new European partners for the Franco-German Main Ground Combat System following a September 2020 conference in Berlin devoted to the effort, according to a government report to parliament.

The German and Israeli defence ministries have signed an agreement for the purchase of the Rafael-made Trophy active protection system for the Bundeswehr's Leopard 2 tanks, the two governments announced on the 23rd February.

The deal will see the defence system, which fires projectiles at incoming anti-tank munitions, installed on a company's worth of tanks by 2025; that is 17 operational vehicles plus one reference type for testing.

The Bundesamt für Ausrüstung, Informationstechnik und Nutzung der Bundeswehr (BAAINBw), Germany's Federal Office for Bundeswehr Equipment, Information Technology and In-Service Support, awarded Rheinmetall a contract at the end of January 2021 to upgrade 27 more Boxer command vehicles to the A2 standard, this award bringing all the Bundeswehr's Boxer command vehicles up A2 standard.



Hungary

New Main Battle Tanks are required. 44 T-72M1s are currently in service.



Ireland

A mid-life upgrade for the Piranha APCs is a key priority, as are new armoured vehicles. 80 Piranha IIIs are currently in service.



Italy

On the 22nd January 2021, the 82nd Infantry Regiment of the Italian Army received the first 12 light tactical armoured vehicles LMV 2 (Italian military designation: VTLM 2 NEC, or Lince 2) manufactured by Iveco Defence Vehicles.

The vehicles were delivered under a contract issued by the Italian Ministry of Defence in 2017 for the first 34 serial LMV 2s, valued at 53 million euros.

The general plans of the Italian army provide for the purchase of 2,000 LMV 2 units until 2034, with a partial replacement of the LMV fleet.

At the beginning of 2021, it was reported that the Italian army approved the purchase of a new batch of 650 Lince 2 NEC vehicles, for which funds were allocated for the purchase of 165 units under the 2021 budget and a contract will be signed for them in the near future.

Italy and Germany are considering co-operation on future combat vehicles. The Italian Army is looking for a successor to the Dardo IFV, which has been in service for 40 years. The same applies to the Ariete MBT, which is almost as old. No replacement has currently been planned for either vehicle and Italian industry has no acceptable solution at this time. For some time, talks between Germany and Italy have been held at government level to find ways for Italy to participate in European combat vehicle programmes.

An upgrade to the Ariete MBT is planned. 3 prototypes will be produced initially.

Up to 150 Centauro II wheeled tanks are to be upgraded. The first 10 were ordered in July 2018 and a further 86 (plus 10 on option) in December 2020.

249 Freccia 8x8s were ordered in 2006 and a further 81 were ordered in December 2019. Up to 381 may eventually be procured by 2024, with over 260 currently in service.

The procurement of Lynx IFVs for the Italian Army has emerged as a realistic plan for the future. Under these plans, Italy could acquire 400 to 600 Lynxs between 2025 and 2035 to replace the Dardos.

The Lynx could also find its way into the Pesco project for the development of a combat vehicle, in which Italy has taken the lead. Other members of the project are Greece and Slovakia.

Italy is attempting to join the Franco-German MGCS project to develop a future land combat system. The expected high production volume (estimates go up to 2,500 systems) is expected to bring cost advantages in procurement and operation.

Italy's participation in the Lynx IFV and MGCS could support the repeatedly demanded consolidation of the European defence industry and force the Europe-wide introduction of common vehicle families in combat vehicles.



Latvia

Light and Medium armoured fighting vehicles are planned for procurement.



Montenegro

Light Armoured Vehicles are a procurement priority.



Netherlands

The Dutch Defensie Materieel Organisatie has signed a \$584 million contract with BAE Systems Hägglunds for the upgrade of the Royal Netherlands Army's (RNLA's) 122 CV9035NL infantry fighting vehicles (IFVs). First production deliveries are to commence in 2024 and conclude in 2027.



North Macedonia

Light Armoured Vehicles are a procurement priority.



Norway

A planned upgrade to Norway's fleet of Leopard 2A4 Main Battle Tanks has been postponed until the mid-2020s. 36 Leopard 2A4s are currently in service, with 16 more in store.



Poland

It was announced on the 14th July that Poland will procure the most advanced variant of the General Dynamics Land Systems M1A2 Abrams main battle tank (MBT).

250 M1A2 System Enhancement Package version 3 (SEPV3) tanks will be ordered — sufficient to equip four tank battalions. Approximately 15 tanks will be used for training purposes.

The new tanks will partially replace the 300-strong fleet of T-72M/M1 MBTs in Polish service.



Portugal

More VAMTAC ST5 4x4 high-mobility tactical vehicles have been received by the Portuguese Army.

Almost 100 VAMTAC ST5 vehicles, designated Viatura Tática Ligeira Blindada (VTLB), were in Portuguese service as of August 2020.

Under a \$70 million contract announced in October 2018, the NATO Support and Procurement Agency (NSPA) and manufacturer Urovesa are delivering 139 VAMTAC ST5s to the Portuguese armed forces.

The order comprises 107 troop transports, 7 command posts, 13 medical evacuation and 12 special operations vehicles.



Romania

Armoured Vehicles are planned to be procured. 12 Piranha IIICs are being delivered along with 227 Piranha Vs.



Slovakia

In September 2021, it was reported that the Slovak Government has approved the purchase of 152 tracked and 76 wheeled armoured fighting vehicles.



Slovenia

The Slovenian Armed Forces are to be equipped with Boxer armoured personnel carriers as part of the military's modernization plan. 45 all-terrain 8x8 Boxers are to be procured to equip the equivalent of a battalion.

Negotiations with Slovenia regarding the procurement of Boxer APCs reached an advanced stage in 2018, but in February 2019 the programme was stopped due to a lack of tactical studies. At that time, Slovenia was planning to procure 48 Boxers based on the configuration for Lithuania, which mainly procured Boxers with infantry turrets and 30mm cannons. The procurement was said to be valued at 306 million euros.

Slovenia will become the sixth Boxer user after Germany, the Netherlands, Lithuania, Australia and Great Britain. Also, the total number of Boxers ordered will reach 1,473.



Spain

The Spanish Army VCR (Vehiculos de Combate sobre Ruedas, or Wheeled Combat Vehicle) Dragon has undergone its acceptance and security testing. These tests will evaluate the VCR's lethality, survivability, sustainability, mobility and deployability, as well as its ISTAR and C3 capabilities.

The Spanish Army initial production contract was formally signed in August last year. The €2.1 billion contract funds the production of 240 full configuration VCRs and 108 in a partially completed state, lacking auxiliary power units or in the case of the cavalry and anti-tank variants, their turrets. The contract does not fund the VCR's Local Situational Awareness System and simulation elements either. However, the Spanish Army expects the funding situation to be alleviated soon.

The manned turret for the VCR cavalry variant will only be selected in 2022. The contenders were not detailed, with it only being noted that the Leonardo HITFIST manned turret currently demonstrated on one of the VCR prototypes may not be the final configuration. It was stated that the cavalry turret requirements stipulated a "minimum" of 30mm calibre for the cavalry variant's main gun.

The Spanish Army's plans for VCR initial operating capability involve the first VCR-equipped infantry company to reach initial operational capability (IOC) no later than June 2024, while the first VCR task force is expected to do so no later than January 2025. The VCR will be the core of the Spanish Army's 'Land Force 2035', with its STANAG-compliant open systems architecture making it the most advanced Spanish Army vehicle at the brigade level.



Turkey

A contract was signed with BMC in 2018 for the first batch of Altay Main Battle Tanks. Prototype testing was scheduled to start in 2020.

The Altay programme has faced delays due to a lack of access to significant components such as the engine, transmission and armour.

The Altay programme dates back to the mid-1990s, but it wasn't until November 2018 that the Turkish government awarded the tank's multibillion-dollar contract to BMC. In a competition, the firm defeated Otokar, which had already produced four Altay prototypes under a government contract.

The contract involves the production of an initial batch of 250 units, life-cycle logistical support, and the establishment by the contractor of a tank systems technology centre and its operation. As part of the contract, BMC will design, develop and produce a tank with an unmanned fire control unit. The contract said the first Altay tank was expected to roll off the assembly line within 18 months.

The Altay programme is broken into two phases: T1 and T2. T1 covers the first 250 units, and T2 involves the advanced version of the tank. Turkey also plans to eventually produce 1,000 Altays, to be followed by an unmanned version.

Turkish-Qatari armoured vehicle JV BMC displayed some new hardware in late January 2021, including a brand new prototype 8x8 APC and a heavily modified Leopard 2A4 MBT.

The previously unknown APC was shown equipped with an Aselsan Korhan 35mm RWS, as well as laser warning and detection technology, a sniper locating system and the Akkor active protection system (APS — also made by Aselsan).

The Turkish Land Forces plan to acquire 2,962 light armoured vehicles under their future plans.



U.K.

The Challenger 2 modernization programme will go ahead, but with the tank fleet reduced from the current level of 227 to between 150 and 170.

Anglo-German armoured vehicle-maker Rheinmetall BAE Systems Land has signed a deal with the British Defence Ministry to upgrade Challenger 2 main battle tanks.

The £800 million (U.S. \$1 billion) contract announced on the 7th May will see 148 British Army tanks upgraded to the Challenger 3 standard.

The British confirmed a cut of 35 percent in its main tank fleet in the recently published integrated defence, security and foreign policy review. At one point, speculation suggested the government was looking to axe the entire Challenger tank force.

The principal upgrade of the Challenger 2 will involve replacing the current L30 120mm rifled gun for the high-pressure L55A1 smoothbore cannon. Other improvements to the tank will include a new digitized turret, improved sights and upgraded protection, among other advances. Full operating capability for the tank is planned for 2030, with initial operating capability expected by 2027.

Britain appears to still be interested in future main battle tank programmes, having held discussions with Germany and France to possibly join the Main Ground Combat System project as an observer.

General Dynamics UK has joined forces with European missile maker MBDA to position itself for an upcoming British Army requirement to field an "Overwatch" anti-armour vehicle to support the army's heavy and deep recce strike brigade combat teams.

The companies are offering the Ares version of the Ajax tracked reconnaissance vehicle already purchased by the Army fitted with a Brimstone missile capability carried in a modular cannister to meet a requirement to strengthen its anti-armour capability.

The teaming effort and the building of a capability demonstrator were announced by the companies on the 26th July. The Army already has the Battlegroup Organic Anti-Armour (BGOAA) programme, in the pre-concept phase, which includes the armed overwatch requirement.

Armed overwatch is a priority for the British and likely to be one of the first elements of the wider BGOAA programme the military will look to move forward with as the procurement effort ramps up.

Ares is a troop carrying reconnaissance vehicle acquired by the British in a wider 2014 deal with General Dynamics worth £3.5 billion to provide 589 vehicles in the Ajax family.

The principal variant is a scout vehicle armed with a 40 mm case telescoped cannon.

Some 34 Ares vehicles were purchased as part of the deal and deliveries of the variant started in 2020.

Recent reports suggest that the long-delayed Warrior update effort, launched in 2011, will not progress to the manufacturing stage, with the planned capability to be completely abandoned.

Warrior entered service in the late 1980s. In 2009, the Army began the Capability Sustainment Programme (WCSP) to upgrade the weapon and turret as well as to enhance armour protection and electronic systems. The contract for WCSP was awarded to Lockheed Martin UK in 2011.

The programme has reportedly spent around 50% of the allocated budget (£800 million) but is yet to place a manufacturing contract.

The WCSP is currently £227 million over budget. Its in-service date originally was planned for 2017 but is now scheduled for 2024. Up to 380 vehicles could be upgraded if the programme continues.

There is a requirement to retire the FV430 fleet, which has been the workhorse of British Army mechanised units for 60 years.

508 Boxer Mechanised Infantry Vehicles were procured in 2019 from ARTEC, with initial deliveries scheduled to begin in 2023.

One benefit of the Boxer family is its single chassis type, offering commonality of components and spare parts which simplifies logistic support and vehicle maintenance.

The Multi Role Vehicle-Protected programme (MRV-P) is currently under review.

The US-built Joint Light Tactical Vehicle (JLTV) had previously emerged as the British Army's preferred choice to fill the MRV-P package 1 requirement to provide command, liaison and logistic vehicles.

Since the JLTV emerged as a front runner, the UK has yet to order the vehicle. Changes to government plans have called the possibility of ordering a US vehicle into question.



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NORTH AMERICA



Canada

In August 2020, work started on the Armoured Combat Support Vehicle, with a total of 360 planned.

The Light Armoured Reconnaissance and Surveillance System (LRSS) has suffered delays because of the bankruptcy of a subcontractor to DRS that was supposed to provide the telescopic mast system for the LAV surveillance system.

The handover of the first Canadian Army LAV 6.0 vehicle fitted with the new Light Armoured Reconnaissance and Surveillance System (LRSS) is anticipated later in 2021.

Deliveries will continue to mid-2022. This represents a delay of 12-18 months than initially planned. The LRSS system was to have been delivered in early 2020, with an IOC achieved by the end of 2020.



U.S.A

The Next Generation Combat Vehicle (NGCV) programme includes the Optionally Manned Fighting Vehicle, Unmanned Vehicles and the Abrams Main Battle Tank replacement.

In April 2020, the U.S. Army re-structured the Optionally Manned Fighting Vehicle (OMFV) programme to replace the Bradley Infantry Fighting Vehicle. A draft request for preliminary digital designs was issued in July 2020, as the first of 5 phases. Low-rate production is scheduled from 2028 and full-rate production is planned to commence in 2029.

The U.S. Marine Corps has selected Textron Systems and General Dynamics Land Systems to begin contract negotiations to build advanced reconnaissance vehicle prototypes, it was announced on the 16th July.

The Marine Corps will also work with BAE Systems to study the possibility of adapting an amphibious combat vehicle to become an advanced reconnaissance vehicle, or ARV.

GDLS, which is the manufacturer of the Light Armoured Vehicle-25 currently in service, submitted an ARV prototype proposal by the Marine Corps' 3rd May deadline.

Earlier this year, BAE Systems would not confirm whether it planned to participate, but it was believed the company had submitted a bid. BAE manufactures the Marine Corps' currently fielded amphibious combat vehicle.

The Marine Corps wanted proposals for the research and development of an ARV prototype as part of its pursuit to replace roughly 600 LAV-25s in light armoured reconnaissance battalions, that can function as battlefield managers. The vehicles will need to operate amphibiously.

The U.S. Army has scheduled the initial operational test for its newest tracked vehicle to begin the second quarter of fiscal year 2022.

The BAE Systems-manufactured Armoured Multi-Purpose Vehicle (AMPV) has already begun production qualification testing and has continued live fire testing ahead of the operational evaluation. The current LRIP contract, which was awarded in 2018, is for more than 450 vehicles. The stated requirement is for 2,936 vehicles to replace M113s.

The first fielding for AMPV is projected in the second quarter of FY23, roughly a year after the start of the IOT&E, according to the Army's Programme Executive Office for Ground Combat Systems (PEO GCS).

The programme has experienced some delays with BAE failing to meet the July 2020 first delivery date schedule due to production challenges and effects of the coronavirus pandemic.

A full-rate production decision is currently scheduled for the third quarter of FY22.

The Army has already scaled back its AMPV procurement in FY21 due to delays. Originally the service planned to buy 143 in that year but now is purchasing just 32. The total objective requirement remains the same across the service's five-year budget plan.

The U.S. Marine Corps is withdrawing its Main Battle Tanks from service. By the end of 2020, 323 had been transferred to the U.S. Army. The remaining tanks were scheduled for transfer by 2023, which included tanks in overseas storage and aboard maritime prepositioning ships, according to Marine Corps Systems Command.

The U.S. Army has taken receipt of its light and medium Robotic Combat Vehicle (RCV) prototypes from industry teams and is trialling them, ahead of a major company-level soldier assessment in 2022.

The service took delivery of the first of four RCV-Light vehicles from a QinetiQ North America and Pratt Miller team, which won the contract to produce the prototypes a year ago, in November 2020 with the other three arriving in December.

The RCV-L is a diesel-electric hybrid with a gross vehicle weight of no more than 8,500 pounds and a maximum payload of no more than 7,000 pounds, boasting a top speed of about 40 miles per hour.

The four prototypes were delivered to the Army's Ground Vehicle Systems Centre where a team began integrating the government-developed Robotic Technology Kernel (RTK) autonomy software onto those platforms.

After a functional checkout, the prototypes were sent to Texas A&M University's Rellis campus where, over the course of February, the team was able to pair them with a Mission Enabling Technology Demonstrator — or MET-D vehicle — to begin the manned-unmanned teaming process.

While the Army was expecting to receive its RCV-Medium prototypes from a Textron, Howe & Howe and FLIR team starting at the end of April through May, the service took early delivery of a partially completed RCV-M in mid-

February in order to begin integrating the RTK software.

RCV-M is also a diesel-electric hybrid with a gross vehicle weight of 25,000 pounds. The vehicle is equipped with a remotely operated 30 mm cannon and has a top speed of over 25 miles per hour.

The Army has resumed product verification testing for the latest variant of its Family of Medium Tactical Vehicles (FMTV).

The A2 variant ran into problems during PVT testing and the Army programme office stopped the effort about 50,000 miles into a 170,000-mile reliability test in May 2020. The upgraded A2 variant include an adjustable suspension system, increased payload, improved ride quality, electronic stability control, and an underbody protection kit.

The Mobile Protected Firepower (MPF) light tank programme commenced in 2015, with EMD and rapid prototyping contracts awarded to BAe Systems and GDLS in December 2018. The Soldier-Vehicle Assessment phase commenced in early 2021, with deliveries of the first of a planned 504 vehicles to commence in 2025.

The JLTV (Joint Light Tactical Vehicle) is currently being produced by Oshkosh Defense. In August 2015, the Army awarded Oshkosh a \$6.7 billion low-rate initial production (LRIP) contract to procure the initial 16,901 vehicles for the Army and Marines. In June 2019, the Assistant Secretary of the Army (Acquisitions, Logistics, and Technology) approved Army JLTV full-rate production (FRP). The Army plans for a follow-on full-rate production contract to be awarded to a single vendor in the fourth quarter of FY2022. It is planned to be a competitive five-year contract with five one-year options, with an expected value of \$12.3 billion, for about 30,000 JLTVs and 10,000 JLTV trailers. The Army began fielding LRIP JLTVs to units in April 2019, and Marine Corps units received their first LRIP JLTVs in February 2019.

The U.S. Army has awarded tactical vehicle manufacturer Oshkosh Defence a \$942.9 million contract to upgrade its Stryker Double V Hull Infantry Carrier Vehicles. The contract includes integrating a 30mm Medium Calibre Weapon System (MCWS) onto the wheeled armoured vehicles to provide increased lethality to the Stryker brigade combat team. The contract also calls for complete system technical support, interim contractor logistics support, and integrated product support.

The Army Contracting Command expects the work to conclude in 2027, with the first batch of upgraded Stryker vehicles to be fielded in 2023.

The U.S. Army is continuing to defend its fiscal year (FY) 2022 budget request to include proposed cuts to the M1 Abrams tank programme.

When the service's proposed budget was delivered in May 2021, it included \$981 million for the Abrams tank upgrade programme to cover 70 vehicles next year. This is a decrease from the enacted FY 2021 level for \$1.3 billion total: \$968 million for 102 platforms, plus an additional \$352 million for a separate M1 Abrams modification programme. The latter line item was scrapped in the FY 2022 budget request and funds 'realigned' into one set of funding.

LATIN AMERICA



Argentina

Three options remain as Argentina looks to procure wheeled 6x6 armoured personnel carriers.

The Brazilian 6x6 VBTP-MR Guarani armoured personnel carrier (APC) is being tested as one option by the Argentinian Army, which is seeking a new capability alongside its decades-old fleet of tracked M113s.



Brazil

The Italian armoured vehicles specialist Iveco Defence Vehicles was poised to begin delivering its first lot of 32 Light Multirole Vehicles (LMVs) to the Brazilian Army in August 2021.

A single 4x4 light armoured tactical vehicle will be delivered to the Army Evaluations Centre (CAEx) for a new round of testing later this year. After this initial delivery, an additional 15 vehicles will be handed over in 2021 before the remaining 16 vehicles are delivered in 2022. Two additional buys of LMVs are expected in the future.

The initial 32 LMVs, in a multi-role configuration, were purchased under a BRL67.8 million (\$12.5 million) contract with CNH Industrial Brasil in November 2019 as part of the army's Light Tactical Armoured Multirole Wheeled Vehicle (VBMT-LSR) project.



Jamaica

Jamaica received 6 Bushmaster armoured utility vehicles in June 2020 and is planning to procure more armoured vehicles valued at \$4.6 million.



Peru

The Peruvian Army, seeking to increase operational capacity, has taken delivery (in 2021) of a batch of Aurum Security A200 4x4 armoured vehicles, to be used in the so-called VRAEM region to increase capability against guerrilla and narco-trafficking activities.

The governing contract, valued at in excess of \$2 million, dates from September 2019, subsequent to which a batch of ten vehicles was noted at the supplier's facilities. The Aurum Security A200 uses a Toyota Land Cruiser 200 commercial truck chassis, with an improved suspension and brakes, and provides protection against 7.62x51mm calibre hard-core bullets, while being light enough to move over rough terrain.



Venezuela

Due to a lack of funds, the Venezuelan Army is repairing and refurbishing obsolete Western-supplied vehicle fleets to maintain a meaningful capability. This includes AMX-13s.

MIDDLE-EAST AND NORTH AFRICA



Algeria

In Algeria, the country estimated to be the world's sixth-largest importer of military equipment, Russian armoured vehicles account for more than 75% of the country's existing fleet. Notwithstanding its close historical ties to Algeria, France is only the third-largest exporter of armoured vehicles to Algeria, due to the country's decision to adopt and assemble under licence g80 German Rheinmetall Fuchs 2 6x6 armoured vehicles.

Algeria has recently implemented multiple upgrade programmes and a host of new procurements. Algeria continues to purchase the T-90SA from Russia.

There are several indications that Algeria could assemble the Boxer 8x8 at the same facility responsible for its Fuchs. Algeria is also producing the Nimr Ajban series under licence.

Algeria is expected to continue licensed production of the Fuchs 2 until the mid-2020s and may also decide to set up a similar arrangement for the Boxer 8x8. Russia's UVZ is anticipated to secure further orders for the T-90SA MBT.



Egypt

400-500 T-90 Main Battle tanks may be procured from Russia although these reports have not yet been substantiated.

North African military vehicle development has focused on 4x4 light tactical vehicles and mine-protected vehicles, usually with foreign assistance. This is most advanced in Egypt, home to the Temsah and Imut family of mine-protected vehicles.

Egypt's Eagles Defence International Systems is believed to be producing the Minerva Special Purpose Vehicles (MSPV) Panthera platform.



Israel

In August 2019, The Israel Ministry of Defence (MoD) unveiled a new armoured fighting vehicle (AFV) concept, dubbed Carmel, that uses artificial intelligence (AI), autonomous capabilities, and enhanced situational awareness to achieve new levels of battlefield effectiveness.

The goal of the programme is to reduce the number of onboard personnel in AFVs like the Merkava tank from four to two and enable them to operate under closed hatches, with the vehicle driving itself, detecting threats in real time, and providing recommendations to the crew on critical decisions.

The vehicles will also be able to control unmanned air and ground vehicles, as well as operate as part of a network that builds a shared picture of the battlefield and co-operate to efficiently engage targets.

The programme will not immediately produce new vehicles, according to the MoD, but will develop capabilities that will gradually be installed on the Israel Defence Forces' (IDF's) Merkava Mk 4, the next-generation Barak tank, the Namer tracked armoured personnel carrier (APC), and the Eitan wheeled APC. The MoD will also begin developing an AFV that incorporates the new capabilities at an unspecified time in the future.



Kuwait

In July 2021, The General Staff Headquarters of the Kuwait Armed Forces unveiled an upgraded M1A2K Abrams main battle tank. The Government of Kuwait has requested a foreign military sale (FMS) of M1A2Ks, ammunition and associated equipment from the United States.

The upgraded tank will improve Kuwait's capability to meet current and future threats by enabling continued employment of the M1A2 Abrams main battle tank and supporting modernization of the country's tank fleet. The training ammunition will be used to qualify Kuwait's M1A2 tanks.



Lebanon

A shipment of 100 armoured patrol vehicles sailed from the U.K. in January 2021 as a donation from the British government to the Lebanese Armed Forces to secure the northern and eastern borders.

The Land Rover RWMIK — or Revised Weapons Mounted Installation Kit — vehicle package is worth £1.5 million (U.S. \$2 million).

The U.K. previously supported Lebanon's military by deploying four land border regiments, and providing 350 Land Rovers.



Morocco

Morocco has received approval from the US to procure an additional 162 M1A1 Abrams for \$1.259 billion. Morocco may also procure the Arqus VAB Mk3 from France.



Saudi Arabia

In a first for the United Arab Emirates and Saudi Arabia, their respective defence industry conglomerates signed a deal to produce the four-wheel drive JAIS vehicle, developed by Emirate firm Nimr, in Saudi Arabia.

Negotiations between Edge Group subsidiary NIMR and Saudi Arabian Military Industries were ongoing for some time over the terms of a potential partnership — the teaming agreement that encapsulates the latest deal. The production plan was finalized during the International Defence Exhibition and Conference, taking place in Abu Dhabi, UAE, from the 21st-25th February.

JAIS is a mine-resistant, ambush-protected vehicle that incorporates a so-called crew citadel protection system to safeguard against mines, improvised explosive devices and ballistic threats.



U.A.E

It was announced in February 2019 that the South African Mbombe 4 armoured vehicle was to be procured by the UAE Army. 4 vehicles were included in the initial contract.

In 2017, 400 Rabdan 8x8 wheeled armoured vehicles were ordered from Otokar, of Turkey, to be produced in a joint company. The first batch of 100 vehicles had been delivered by March 2020

ASIA PACIFIC



Australia

Germany – Germany's Rheinmetall has delivered a new batch of 25 Boxer vehicles to Australia under the country's army modernization programme, it was announced on the 2nd June.

The newest vehicles came in a combat reconnaissance configuration, of which Australia stands to receive 131 vehicles under the \$5.2 billion Land 400 Phase 2 Mounted Combat Reconnaissance Capability project. The CRV variants constitute the bulk of the country's total order of 211 Boxers.

Hanwha-led Team Redback officially launched its Redback infantry fighting vehicle in January 2021 ahead of delivering three for evaluation trials as part of a risk mitigation effort for the Australian Army.

The infantry fighting vehicles are undergoing trials as part of Project Land 400 Phase 3, which will procure about 450 tracked IFVs that will replace Australia's fleet of M113AS4 armoured personnel carriers. The Redback, which is named after a venomous spider found in Australia, is competing against Rheinmetall's Lynx KF41 for the programme, which is due to announce a winner in 2022.



China

Deliveries continue of ZBD-04/04A tracked infantry fighting vehicles and ZBL-08 wheeled armoured vehicles. Several variants of the ZBD-04 and improved ZBD-04As are operational. Around 2,500 of these armoured vehicles have been delivered. The ZBD-04A will probably replace the ZD-86, which is a direct copy of the Soviet BMP-1.

The ZBL-08 entered service in 2009 and at least 13 variants have been identified.

The ZSL-92 is being replaced by the ZBL-08. The ZBL-08 has heavier armour and firepower than the ZSL-92.



India

As the Indian Army plans to acquire 1,750 Future Infantry Combat Vehicles (FICV), the country's foremost defence research agency DRDO has provided approval for this significant project. FICV will become the mainstay of the Indian Army's mechanized troops.

The Indian Army is hopeful of obtaining 1,750 FICVs worth 60 billion rupees, and will eventually replace the currently used BMP-2 designed by the Soviet Union in the 1980s with 49 mechanized infantry battalions.

These BMPs are manufactured under a production license by Ordnance Factory Medak in Telangana. The Army plans to replace the current BMP-2 infantry fighting vehicle by 2025.

The Indian Army also plans to procure over 1,700 Future Ready Combat Vehicles (FRCVs) in a phased manner under the strategic partnership route, with the induction of the "future tank" expected to be completed by 2030. According to a Request for Information (RFI) released by the Army on the 1st June 2021, the 1,770 FRCVs will be procured along with transfer of technology, performance-based logistics, engineering support package, and other maintenance and training requirements. The prospective vendors had to respond to the RFI by the 15th September 2021. An earlier Request for Proposal floated on the procurement of FRCVs in 2017 stands cancelled.

Earlier in 2021, the Ministry of Defence had granted approval to the Army's proposal to procure 118 indigenously-manufactured Arjun Mark 1-A 'Hunter Killers' at a cost of Rs 8,380 crore.

In April 2021, the Army had also released an RFI to procure around 350 light tanks in a phased manner under the Make in India initiative.

The new tank will replace the army's obsolescent T-72 tanks. The FRCV would be developed instead of the Defence R&D Organisation (DRDO) proposal to design the next-generation Future Main Battle Tank (FMBT). FRCV is a direct blow to "Make in India", replacing not just the indigenous FMBT project but potentially also the Future Infantry Combat Vehicle (FICV) project that is being tendered shortly to Indian vendors.



Japan

Japan might have to look overseas for its next LAV 4x4. As Tokyo looks for a replacement of its Light Armoured Vehicles (LAV), the ability of its domestic industry to develop a suitable alternative looks to be in doubt.

Japanese company Komatsu produced 1,937 LAVs from 2001-16, and they are used by both the Japan Ground Self-Defense Force (JGSDF) and Japan Air Self-Defense Force (JASDF).

Japan's Acquisition, Technology & Logistics Agency (ATLA) has been considering a LAV replacement for several years.

The LAV's lack of interior space and self-protection are its known weaknesses and the vehicle will require a new engine to meet future tightening of exhaust regulations.

The Japanese MoD hopes to contract mass production in 2025, or earlier if possible. Four prototypes will be produced, and series production is expected to reach 1,800-2,200 vehicles.

Komatsu, the manufacturer of the LAV, decided in February 2019 to withdraw from military vehicle production.

Mitsubishi Heavy Industries (MHI) and Hitachi are the only other companies to have developed armoured vehicles for the JGSDF. MHI produces the Type 16 Manoeuvre Combat Vehicle and Type 10 MBT.



Myanmar

New Armoured Vehicles have been received, mainly from China (APCs) and Russia.



Philippines

The second phase of the Horizon modernisation programme was approved for the 2018-2022 period in 2018 and includes new armoured vehicles.



Singapore

The Hunter AFV was commissioned into the Singapore Armed Forces in June 2018 to replace the M113. An estimated 50 had been delivered by early 2021.



South Korea

In 2021, The South Korean military is validating a new locally developed protected multirole vehicle, called the KMPV Blue Shark, to support Korea's products in the international defence export market.

Product trials conducted by the Army through the military's validation initiative include performance tests and evaluations by Army operators. In return for freely lending their vehicles to the Army, defence suppliers receive evaluations that support their products in the international defence export market.

The medium-weight armoured-wheeled vehicle was developed by the Armor Kovico company for armed forces and for a wide range of Police and Law Enforcement special operations.

The vehicle has a length of 6.0m, a height of 2.3m and a gross weight (GVW) of 12,000kg. It can carry up to ten people, including three crew members and can be integrated with a variety of mission kits and complex systems for mission-specific roles. The maximum speed on the highway is 120 km/h.

It uses cost-effective, commercial, off-the-shelf (COTS) components and features an armoured monocoque cabin, which offers high-level protection and the highest internal volumes.

South Korean company Hyundai Rotem announced on the 29th September 2020 that it has secured a KRW407.7 billion (\$348.6 million) contract for the production of a third batch of K806 and K808 wheeled armoured combat vehicles for the Republic of Korea Army (RoKA). Awarded by the Korea Defense Acquisition Programme Administration (DAPA), the contract requires deliveries to be completed by 2023, but the number of vehicles ordered has not been revealed. The RoKA requires at least 100 K806 6x6 wheeled armoured vehicles, and at least 500 of the larger K808 8x8 wheeled armoured vehicles.

On the 25th January 2021 the Defense Acquisition Program Administration (DAPA) announced completion of the development of the latest version of the K808. This Command variant provides a platform for a commander and staff with protection and mobility to operate and keep up with armoured forces. Production of the Command vehicle is scheduled to begin in 2022.



Taiwan

The Taiwan's Ministry of Defence's Armament Bureau has announced the development of a new variant of the Clouded Leopard armoured vehicle, with two prototypes scheduled to be completed before 2023. The new fire support vehicle variant will be armed with a 105-mm cannon, a 7.62 mm coaxial machine gun, and an additional 12.7 mm remote control gun turret. The vehicle will be operated as a fire support vehicle with armament designed primarily for infantry support in the Taiwanese armed forces.

According to the 2021 Ministry of Defence (MND) budget, the Armament Bureau has set aside NT\$768 million (\$27 million) to develop prototypes of a number of artillery vehicles between 2019 and 2023. The new variant will be suited for rapid strikes and introduced in MND's newly established joint arms battalion. At the same time, the Armament Bureau is updating the gun system to be remotely controlled. The Bureau is working with the National Chung Shang Institute of Science and Technology to provide the vehicle design. The Taiwanese military currently has a variety of Clouded Leopard armoured vehicles, including the CM-32 and CM-33 models, which are both equipped with grenade launchers, and the CM-34 variant, which is armed with a 30-mm MK44 chain gun.



Thailand

Chaiseri is continuing to promote its First Win family of 4x4 multipurpose vehicles (MPVs) with the aim of expanding sales in both domestic and export markets. Its latest First Win 2 has been acquired by the Thai military's Internal Security Operations Command.

Chaiseri earlier sold the original First Win to the Royal Thai Army. The proposed upgrades will increase the baseline vehicle's combat weight to around 14 tonnes, but will feature a new and more powerful 300hp power-pack that offers a power-to-weight ratio of 21.5hp/tonne and an operational range of 600km (372 miles). Additional armour protection as well as 76mm smoke grenade launchers have been installed, while an optional automatic fire suppression system can also be fitted to enhance crew safety.

Thailand's state-owned Defence Technology Institute (DTI) is developing the 8x8 Amphibious Armoured Personnel Carrier (AAPC) to meet the specific requirements of the Royal Thai Marine Corps (RTMC).

According to the DTI, work on the AAPC commenced around 2016 and leverages on the experience gained from the development of the ongoing 8x8 Black Widow Spider armoured vehicle being developed for the Royal Thai Army.

Panus Assembly is developing the 8x8 R600 armoured fighting vehicle, which is designed to be a multi-role combat vehicle that can be adapted to meet the individual requirements of the army, navy and air force.

A prototype R600 was unveiled at a field trial at the Royal Thai Army (RTA)'s vehicle testing range in Kanchanaburi Province in late August 2020, two years after Panus commenced development work.

Local companies nevertheless continue to face stiff competition from foreign designs. The RTA received the first batch of two refurbished ex-US Army 8x8 General Dynamics Land Systems Stryker infantry combat vehicles (ICVs) in late August. The delivery comes after the US Defense Security Cooperation Agency (DSCA) announced on the 26th July that the US State Department had approved the sale of 60 Strykers.



SUB-SAHARAN AFRICA



Kenya

Kenya's military has ordered 118 four-wheel drive personnel carriers from Turkish armoured vehicles manufacturer Katmerciler.

The Hizir vehicles will be deployed for counter-terror operations against the al-Shabab militant group.



Madagascar

Approximately 6 Panthera T.4 armoured utility vehicles were received from the U.A.E. in 2020.



Nigeria

Some of the most advanced armoured vehicles in Nigeria Army include Isotrex's Phantom 2, Marauder and locally manufactured Infantry Patrol Vehicle (IPV) fitted with a mounted heavy machinegun; a Tactical Patrol Vehicle with seating for eight personnel, and a Light Tactical Vehicle armoured personnel carrier.

The Ezugwu armoured vehicle is locally made and one of most advanced armoured vehicles in Nigeria Army, one of many different vehicle types the Nigerian military is taking into service.

In 2020, the Nigerian Army also received Chinese-made VT-4 main battle tanks, ST1 8x8 tank destroyers, South Korean-made Kia Light Tactical Vehicle (KLTV) armoured personnel carriers as well as locally manufactured vehicles.

Other domestically produced armoured vehicles in Nigeria Army include Conqueror and Champion armoured personnel carriers that were designed and built by the Army's engineering unit. Nigeria's Proforce has also delivering its domestically manufactured Ara APCs to the Army.



Senegal

The wheeled PTL-02 Assaulter has been procured from China. 27 are in service.



South Africa

266 Badger infantry fighting vehicles are being delivered to the South African Army. Deliveries are due to be completed in 2022. They will replace the Ratels.

RUSSIA AND EURASIA



Azerbaijan

Tracked armoured vehicles, predominantly of Russian origin have reportedly been recently ordered.



Kazakhstan

The number of Arlan 4X4 protected patrol vehicles planned to be ordered for 2020-2021 has been reduced. Kazakhstan was to procure 274 Arlans and 106 Barys 8x8 infantry fighting vehicles up to 2030, but economic and other factors have necessitated a reduction.



Russia

Variants of the T-90 and T-14 Armata MBTs will not fully replace the T-72 and its variants in the near future

T-72B3M upgrades comprise the majority of modernised MBTs being delivered to the Russian Armed Forces, but T-90Ms and T-80BVMs are also being delivered.

Substantial numbers of new-build BMP-3, modernised BMP-2Ms and BTR-82A/AM IFVs are also still being delivered.

State testing of the Kurganets-25 tracked infantry fighting vehicle and the Bumerang wheeled armoured personnel carrier is not planned to complete until the end of 2022.

The T-14 Armata MBT is also in test and deliveries are not expected until 2022.

Assembly has reportedly commenced of the first trial batch of 132 vehicles and support vehicles.



Ukraine

Modernisation is under way of the Shturm-S vehicle. It will be armed with the Barrier-V system with RK-2V missiles.

The Konkurs-equipped vehicle is also being modernised into the Amulet variant. It will be armed with RK-2 missiles as part of the Stugna-P system.

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