EXPAL

Munitions Executive Summit

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	BUSINESS AREA	MAIN PRODUCTS	CLIENTS	LEADERSHIP	
	Civil Explosives	Cartridged explosives Bulk explosives Seismic explosives Delivery systems	Mining Public sector Infrastructures Quarries	#1 in Europe # 2 worldwide	70%
	Initiation Systems	Electric detonators Non-electric detonators Electronic detonators Detonating cord Boosters Safety fuse		# 1 in Europe	
	Chem	Raw materials: Ammonium nitrate Nitrocelulose Fine chemicals	Internal needs Chemical sector	# 1 in Europe	
	Outdoors	Cartridges Components Powder	Shooting clubs Hunting	# 1 worldwide	15%
	Defence	Ammunitions and energetics, weapons systems, maintenance and demil services	Defence Ministries (NATO Area) Defence Companies	# 1 in Demilitarization Recycling in Europe	15%
	Energy	Environment consulting Wind Energy	Internal resources and abilities		

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Electronic systems

Fire control systems

Small calibre ammo

Fuzes

Demilitarization

Complete mortar systems

Nitrocellulose

Nitroglycerine

Propellants

Load, Assemble & Pack

Insensitive Explosives

Forgings

Shells

Bombs

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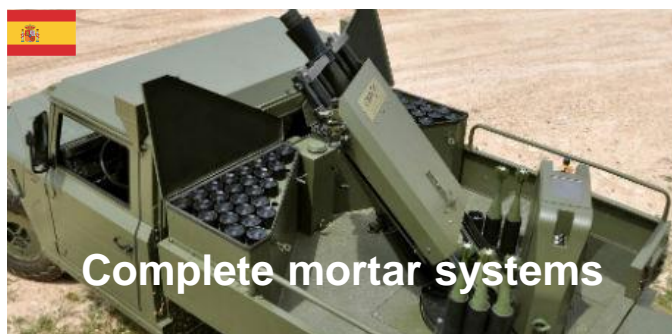
Readiness
Use export markets to sustain in downturn

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- ✕ US products are "MIL-STD"
- ✕ Large number of customers
- ✕ FMS
- ✕ FMF

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- ✕ Fragmented markets
- ✕ Low volumes / country
- ✕ Export complications
- ✕ Alien procurement methods
- ✕ Understanding customer
- ✕ Time to establish networks
- ✕ Exchange rate risk
- ✕ ITAR restriction
- ✕ Domestic competition

Affordability
Combine defense with commercial activities

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- ✕ Large volumes
- ✕ Slow steady cycles
- ✕ Less rigid specs
- ✕ Sharing fixed costs

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- ✕ Lower margins
- ✕ Many small contracts
- ✕ Distribution channels
- ✕ Many different clients
- ✕ Cross training costs

Future Capabilities
Onshoring of alternative technologies

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- ✕ Fast response
- ✕ Easy to import

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- ✕ NIH
- ✕ ITAR restraints
- ✕ Foreign specs

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Readiness

- Reduce regulatory burden
- Sensible ITAR
- Faster export licenses
- Wider scope on licenses
- Pre-approval of items for export

Affordability

- Reduce proposal complexity
- More multi-year contracts
- Less multi-year re-competes
- Increase minimum award quantities

Future Capabilities

- Ownership of IP
- Support for IRAD
- Faster CRADA's
- Facilitate transfer of mature technologies out of government facilities