



Flash information mission on ammunition stocks

Summary of the report



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While the history of conflicts is marked by **recurrent tension** over ammunition, the **overall deterioration of French ammunition stocks since the end of the Cold War** seems to have become unsustainable in terms of both the current strategic context and France's military ambitions.

As a consequence of the "peace dividend", this deterioration has led to a **structuring of the ammunition industry according to a flow logic** and no longer to stocks. The **drastic reduction in the size of the armed forces and the adoption of a model of excellence based on sampling** have made ammunition a **budgetary adjustment variable**, as decided when the armed forces were professionalized and amplified by the **general review of public policies** and then by the economic crisis of 2008.

The **Islamist terrorist attacks of January and November 2015** put a stop to this policy of massive cuts in military budgets, and the beginning of a complete reduction in stocks since 2016 has given the armed forces some room for manoeuvre: **the 2019-2025 military programming law reverses the downward trajectory of ammunition stocks**. At the beginning of the health crisis, in March-April 2020, the shortage of protective breathing masks reminded us of the **crucial importance of having strategic stocks to deal with the unexpected** - an observation that has become even more striking since the return of the high-intensity conflict on the European continent: **a paradigm shift** is now required in terms of stocks. The experience of the Ukrainian conflict illustrates the **many strategic advantages of stockpiling ammunition**. The need to reconstitute military stocks is a fact shared by many Western countries.



This being said, the reconstitution of ammunition stocks raises very different issues depending on whether the ammunition is simple or complex. Although the French ammunition industry is relatively homogeneous in its organization - **structured around major prime contractors and subcontractors in permanent dialogue with the armed forces - ballistic ammunition** - small, medium and large calibers, decoys and devices, powders and explosives, aeronautical bombs - are associated with mass production, whereas propelled ammunition, such as missiles and torpedoes, is more complex to produce. **Highly technological and suitable for so-called high spectrum engagement**, these munitions are distinguished by their range, the type of mission they are assigned and their technicality, generating high development costs and often requiring international cooperation.

With these distinctions in mind, stockpile replenishment requires armies to take into account **global strategic, capability and logistical issues**. Firstly, capability issues are correlated with France's strategic ambitions: stockpile replenishment must be in harmony with the envisaged **commitment hypotheses** and with the increase in requirements due to the **intensification of operational readiness**. The reconstitution of stocks must then take into account a certain **capability coherence** between the **three armed forces**, between the **vector-munitions pairs** or between the **top and bottom of the spectrum** - a balance that we will call “**panachage**”. Finally, the **logistical issues relating to the safety and perishability** of ammunition condition this increase in power.

While the policy of increasing stocks is the responsibility of the armed forces, **the intensification of production flows is an indispensable complement**: the need for mass and thickness made evident by battlefield experience highlights the **indispensable continuity between stocks and flows**. As they should allow forces, **at short notice, to take the operational ascendancy over the adversary**, stocks assume above all **a buffer role allowing industrial production to quickly take over in support of the armies**. The challenge is therefore to **adapt the French defense industrial and technological base** to the requirements of a **hardened battlefield**: this is the purpose of the **war economy**. In this perspective, guaranteeing the economic sustainability of munitions companies - tested by the dividends of peace - by **ensuring the visibility and regularity of orders is a prerequisite**. It is also essential to activate all the levers of the war economy in order to accelerate the pace of production - **simplifying standards and requirements, securing supplies, consolidating human resources**. At the same time, it is important not to sacrifice to the urgency of replenishing stocks the **indispensable preparation for the future**, which also requires a strong anticipation. In this perspective, it is a question of identifying and accompanying the priority technological evolutions and encouraging research and development by providing the latter with reinforced public support.



SUMMARY OF PROPOSALS

Proposal n° 1 : Adapt the replenishment of ammunition stocks to new engagement scenarios.

Proposal n° 2 : Encourage the use of live ammunition in the context of intensified operational preparation.

Proposal n° 3 : Encourage the mixing of ammunition in the build-up of stocks by emphasizing the need for mass.

Proposal n° 4 : Re-internalising the maintenance of missiles in operational condition within the forces when possible and systematizing commitments in terms of availability thresholds in operational maintenance contracts.

Proposal n° 5 : Strengthen the visibility of companies and the regularity of state orders.

Proposal n° 6 : Reconsider the relocation of the small caliber industry at the French or, failing that, European level.

Proposal n° 7 : Give priority to a risk management approach in the apprehension of standards.

Proposal n° 8 : Support the implementation of exemptions for the munitions industry in the framework of the application of the REACH regulation.

Proposal n° 9 : Build up pre-stocks of strategic components and sub-assemblies.

Proposal n° 10 : Relocate strategic sectors for the munitions industry, particularly in the field of powders.

Proposal n° 11 : Set up an industrial reserve made up of young retirees from the munitions sector to anticipate an increase in the need to increase the production rate of munitions.

Proposal n° 12 : Provide the forces with remotely operated ammunition batches capable of coping with the high attrition of high intensity and responding to the needs of the field.

Proposal n° 13 : Strengthen public support for research and development.