

AI in Modern Warfare Market By Type (Weaponized Artificial Intelligence, Defensive Artificial Intelligence, Offensive Artificial Intelligence, Assisting Artificial Intelligence, Autonomous Artificial Intelligence) , By Type of Equipment (Unnamed Aerial Vehicle, Unmanned Ground Vehicle, Combat Systems, Recovery & Maintenance Vehicle, Reconnaissance & Surveillance Vehicle, Medical Evacuation Vehicle) By Application (Tactical Defensive, Military Offensive) : Global Opportunity Analysis and Industry Forecast, 2024-2032

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Abstracts

AI in Modern Warfare Market

The AI in modern warfare market was valued at \$10.4 billion in 2023 and is projected to reach \$109.8 billion by 2032, growing at a CAGR of 29.7% from 2024 to 2032.

The integration of AI into modern warfare is becoming critical for reshaping & improving military tactics. The intelligent algorithm of AI enables decision-making and conflict resolution without human intervention in several scenarios. In modern warfare, AI finds applications in autonomous weapon systems, cyber warfare, predictive analysis, supply chain & logistics management, and counterterrorism.

Increase in investment by governments of several countries to strengthen their military capabilities is a key driver of the AI in modern warfare market. In addition, rise in

geopolitical tensions among several nations has upsurged the necessity for AI integration to enhance their defense capabilities. A notable trend anticipated to acquire traction in coming years in the market is the deployment of AI to transform the training landscape of soldiers and army officials. Simulations powered by AI are expected to personalize military training and boost the engagement & overall agility of army personnel by imposing realistic situations.

However, rise in ethical concerns pertaining to the accountability of decision-making abilities of AI deters its adoption, hampering the growth of the market. Moreover, high vulnerability to unauthorized access and cyberattacks poses security challenges, which restrain the market development. On the contrary, as several defense organizations across the globe have implemented AI solutions or have ongoing pilot projects for its adoption, the AI in modern warfare market is anticipated to witness several lucrative opportunities in coming years. According to a survey conducted by the IBM Institute for Business Value—a Cambridge-based business research organization—on 250 technology leaders from several global defense organizations, approximately 73% believe AI is critical for their operation strategies. Therefore, rise in awareness regarding the capabilities of AI is poised to open new avenues for the market.

Segment Review

The AI in modern warfare market is segmented into type, type of equipment, application, and region. On the basis of type, the market is divided into weaponized artificial intelligence, defensive artificial intelligence, offensive artificial intelligence, assisting artificial intelligence, and autonomous artificial intelligence. Depending on type of equipment, it is classified into unnamed aerial vehicle, unmanned ground vehicle, combat systems, recovery & maintenance vehicle, reconnaissance & surveillance vehicle, and medical evacuation vehicle. According to application, it is bifurcated into tactical defensive and military offensive. Region wise, it is analyzed across North America, Europe, Asia-Pacific, and LAMEA.

Key Findings

On the basis of type, the autonomous artificial intelligence segment is anticipated to account for a high market share throughout the forecast period.

Depending on type of equipment, the unmanned ground vehicle segment is projected to acquire a high stake in the market by 2032.

According to application, the tactical defensive segment is expected to be the highest shareholder during the forecast period.

Region wise, North America was the highest revenue generator in 2023.

Competition Analysis

The leading players operating in the global AI in modern warfare market include Microsoft Corporation, Raytheon Technologies Corporation, Boeing Co., Lockheed Martin Corporation, IBM Corporation, General Dynamics Corporation, Northrop Grumman Corporation, BAE Systems plc, Thales Group, L3Harris Technologies Inc., Leonardo S.p.A, Textron Inc., and Booz Allen Hamilton Holding Corporation. These major players have adopted various key development strategies such as business expansion, new product launches, and partnerships to strengthen their foothold in the competitive market.

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End user preferences and pain points

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Product Benchmarking / Product specification and applications

Product Life Cycles

Scenario Analysis & Growth Trend Comparison

Technology Trend Analysis

Go To Market Strategy

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Additional country or region analysis- market size and forecast

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List of customers/consumers/raw material suppliers- value chain analysis

Market share analysis of players at global/region/country level

SWOT Analysis

Key Market Segments

By Type

Weaponized Artificial Intelligence

Defensive Artificial Intelligence

Offensive Artificial Intelligence

Assisting Artificial Intelligence

Autonomous Artificial Intelligence

By Type Of Equipment

Unnamed Aerial Vehicle

Unmanned Ground Vehicle

Combat Systems

Recovery Maintenance Vehicle

Reconnaissance Surveillance Vehicle

Medical Evacuation Vehicle

By Application

Tactical Defensive

Military Offensive

By Region

North America

U.S.

Canada

Europe

France

Germany

Italy

Spain

UK

Russia

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Rest of Asia-Pacific

LAMEA

Latin America

Middle East

Africa

Key Market Players

Microsoft Corporation

Raytheon Technologies Corporation

Boeing Co.

Lockheed Martin Corporation

IBM Corporation

General Dynamics Corporation

Northrop Grumman Corporation

BAE Systems plc

Thales Group

L3Harris Technologies Inc.

Leonardo S.p.A

Textron Inc.

Booz Allen Hamilton Holding Corporation

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