

# Global Shoulder Fired Weapons Market Size study & Forecast, by Component, Technology, Range and Regional Forecasts 2025-2035

<https://marketpublishers.com/r/S7F85AE9E068EN.html>

Date: June 2025

Pages: 285

Price: US\$ 3,750.00 (Single User License)

ID: S7F85AE9E068EN

## Abstracts

Global Shoulder Fired Weapons Market is valued approximately at USD 8.12 billion in 2024 and is anticipated to grow with a compound annual growth rate of more than 4.72% over the forecast period 2025-2035. Shoulder fired weapons, also known as man-portable air-defense systems (MANPADS) or anti-tank guided missiles (ATGMs), are gaining substantial traction amid evolving asymmetric warfare tactics and intensified battlefield mobility requirements. These compact, easily deployable systems offer military forces the tactical edge to engage aerial and armored threats with precision, without the logistical footprint of heavier artillery. As global defense landscapes transform to counter insurgent threats and regional conflicts, the emphasis on lightweight, multi-domain defense solutions is propelling the adoption of shoulder fired weapons across both developed and emerging economies.

Increased investments in modernization programs, rising cross-border tensions, and the global proliferation of lightweight, high-lethality systems have all converged to stimulate this market's growth. Militaries are actively acquiring guided missile variants that integrate advanced seeker technologies and enhanced target tracking to counter drones, helicopters, and tanks. Meanwhile, unguided RPGs and launchers continue to find favor in urban warfare and guerrilla combat scenarios. The growth is further bolstered by technological innovations in propulsion systems, fire-and-forget capability, and extended range designs that are reshaping battlefield engagement paradigms. However, stringent international arms trade regulations, potential misuse by non-state actors, and the vulnerability of operators in high-risk zones pose serious constraints to market scalability.

Regionally, North America dominates the shoulder fired weapons market, backed by

strong procurement budgets, continuous technology enhancements, and strategic deployments across NATO-aligned missions. The U.S. Army's ongoing contracts for anti-tank guided missile systems and man-portable launchers reaffirm the region's commitment to modernizing infantry capabilities. Europe follows closely with coordinated initiatives across France, Germany, and the UK for portable defense systems amid growing concerns around regional stability and Russian hostilities. In the Asia Pacific, rapid militarization in India, China, and South Korea, coupled with cross-border tensions and counterinsurgency operations, is spurring robust demand for agile ground-combat solutions. Latin America and the Middle East are also increasing procurement, primarily for border security, peacekeeping, and counterterrorism applications.

Major market player included in this report are:

Saab AB

Lockheed Martin Corporation

Raytheon Technologies Corporation

MBDA Inc.

Rafael Advanced Defense Systems Ltd.

Thales Group

Northrop Grumman Corporation

BAE Systems plc

General Dynamics Corporation

Bharat Dynamics Limited

Nammo AS

Leonardo S.p.A.

Elbit Systems Ltd.

L3Harris Technologies, Inc.

Denel SOC Ltd.

## Global Shoulder Fired Weapons Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Component:

Launcher

## Ammunition

### By Technology:

Guided

Unguided

### By Range:

Short Range (>1 Km)

Medium Range (1km–?5km)

Extended Range (>5km)

### By Region:

#### North America

U.S.

Canada

#### Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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