

# Global Artillery Shells with Caliber over 100mm Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Artillery Shells with Caliber over 100mm market size was valued at US\$ 18670 million in 2025 and is forecast to a readjusted size of US\$ 3496 million by 2032 with a CAGR of -21.5% during review period.

Artillery shells with calibers exceeding 100mm are classified as large-caliber munitions and are a cornerstone of conventional ground-based military firepower. These shells are engineered to deliver high-impact explosive force over long distances and are primarily used in howitzers, self-propelled guns, and heavy field artillery. Designed for destructive capacity, area suppression, and counter-battery fire, large-caliber shells serve vital roles in battlefield dominance and force projection. Compared to smaller munitions, they carry greater explosive payloads, offer deeper penetration, and are capable of engaging fortified positions and massed troop formations. In addition to their tactical use, these shells are stockpiled in large quantities by military organizations as part of national defense reserves.

### Strategic Market Characteristics and Geopolitical Context

The global market for large-caliber artillery shells is shaped by a combination of technical barriers, restricted access, and strategic control, making it a highly concentrated and regulated sector. Only a few defense contractors—primarily based in the United States and Europe—possess the advanced production capacity and security clearances necessary to manufacture and supply these munitions. The importance of large-caliber shells has been re-emphasized by recent conflicts, where sustained artillery exchanges have highlighted the centrality of firepower in modern warfare.

Particularly in protracted confrontations, the rate of shell consumption can reach extraordinary levels. Even in non-combat scenarios, large quantities are required for routine military exercises, live-fire training, and readiness operations. The recent need for NATO countries to rebuild depleted arsenals further illustrates how demand remains elevated even during relative peacetime.

### Future Outlook and Demand Dynamics

The market for large-caliber artillery shells is expected to maintain a strong upward trajectory, driven by both active conflict zones and evolving military doctrines. As armed forces across the globe shift toward high-readiness and mobility-focused structures, the role of heavy artillery is being redefined—not as static support, but as a rapidly deployable precision tool in both deterrence and active operations. Countries are increasingly investing in long-range and automated artillery systems, which typically rely on large-caliber munitions for effectiveness. Additionally, the normalization of high-tempo military exercises, combined with growing geopolitical uncertainty, is pushing defense planners to expand their ammunition reserves. Environmental survivability, rapid deployment, and logistical efficiency are also pushing innovation in shell design, favoring modular and more lethal large-caliber types. Altogether, the combination of tactical utility, strategic necessity, and rising geopolitical tensions ensures that the large-caliber artillery shell segment will remain a central and fast-growing component of the broader defense munitions market.

This report is a detailed and comprehensive analysis for global Artillery Shells with Caliber over 100mm market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

### Key Features:

Global Artillery Shells with Caliber over 100mm market size and forecasts, in consumption value (\$ Million), sales quantity (K Rounds), and average selling prices (US\$/Round), 2021-2032

Global Artillery Shells with Caliber over 100mm market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Rounds), and average

selling prices (US\$/Round), 2021-2032

Global Artillery Shells with Caliber over 100mm market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Rounds), and average selling prices (US\$/Round), 2021-2032

Global Artillery Shells with Caliber over 100mm market shares of main players, shipments in revenue (\$ Million), sales quantity (K Rounds), and ASP (US\$/Round), 2021-2026

### **The Primary Objectives in This Report Are:**

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Artillery Shells with Caliber over 100mm
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Artillery Shells with Caliber over 100mm market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include General Dynamics, Nammo, KNDS, BAE Systems, Elbit Systems, Day & Zimmermann, Rheinmetall, Rostec, NORINCO, Poongsan Corporation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

### **Market Segmentation**

Artillery Shells with Caliber over 100mm market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

155mm

152mm

122mm

105mm

Other

### Market segment by Application

High-Explosive (HE)

Smoke

Illumination

Training Rounds

Other

### Major players covered

General Dynamics

Nammo

KNDS

BAE Systems

Elbit Systems

Day & Zimmermann

Rheinmetall

Rostec

NORINCO

Poongsan Corporation

MESKO

MKE

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

**The content of the study subjects, includes a total of 15 chapters:**

Chapter 1, to describe Artillery Shells with Caliber over 100mm product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Artillery Shells with Caliber over 100mm, with price, sales quantity, revenue, and global market share of Artillery Shells with Caliber over 100mm from 2021 to 2026.

Chapter 3, the Artillery Shells with Caliber over 100mm competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Artillery Shells with Caliber over 100mm breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Artillery Shells with Caliber over 100mm market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Artillery Shells with Caliber over 100mm.

Chapter 14 and 15, to describe Artillery Shells with Caliber over 100mm sales channel, distributors, customers, research findings and conclusion.

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