

Global Defence Ammunition Material Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Defence Ammunition Material market size was valued at US\$ 4579 million in 2025 and is forecast to a readjusted size of US\$ 5215 million by 2032 with a CAGR of 1.9% during review period.

Defence Ammunition Material is the energetic and ammunition-grade material body embedded in military ammunition, including high explosives, gun and mortar propellants, primer and ignition compositions, pyrotechnic materials, and combustible charge materials.

Upstream supply of Defence Ammunition Material depends on nitration chemistry, nitrocellulose and propellant intermediates, explosive synthesis capability, energetic plasticisers, specialty additives, compatible packaging, safety systems and licensed hazardous-process infrastructure. Downstream demand comes from artillery, mortar, tank, naval, medium-calibre and small-calibre ammunition programs, usually through multiyear framework agreements, defence procurement lots, replenishment contracts, and in-house transfer into final ammunition assembly. Typical gross margin is estimated at about 23.8%, supported by safety compliance barriers, permitting intensity, long qualification cycles, limited surge capacity and the difficulty of scaling nitration and energetic processing safely.

The market is materially tighter and more concentrated than the broader ammunition value chain because only a limited set of producers can safely manufacture and qualify military explosives, gun propellants, initiation systems and related energetic intermediates at scale. Top 5 suppliers control approximately 38% of global revenue CR5. Europe remains the single most visible regional center because EURENCO,

Nitrochemie, Chemring, Nitro-Chem, Rheinmetall-linked entities and several integrated ammunition groups all continue to expand to address NATO and Ukraine-linked replenishment demand. Australia and selected Asian producers retain strategic national positions in energetic materials and explosive ordnance support.

From 2026 to 2032, the market direction should remain positive, but with a different profile from the 2022-2025 emergency ramp. Growth will increasingly come from stockpile rebuilding, insensitive-munitions adoption, temperature-stable propellant upgrades, local-content and sovereignty requirements, and broader duplication of energetic-material capacity across NATO and partner countries. EURENCO has already announced major financing and ASAP-backed expansion, including sharp increases in powder and modular-charge capacity; Chemring continues to report strong demand in propellants and energetic materials; GDOTS has announced another 20% increase in Ball Powder propellant capacity; and Rheinmetall continues to win large propellant-charge and ammunition contracts while expanding output. The main bottlenecks are still nitrocellulose availability, explosive-synthesis permitting, environmental and worker-safety compliance, skilled process labor, and the long time required to qualify new material lines. AI will matter mainly in quality inspection, process-control analytics, predictive maintenance and batch-consistency management.

This report is a detailed and comprehensive analysis for global Defence Ammunition Material market. Both quantitative and qualitative analyses are presented by company, by region & country, by Material Family 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 Defence Ammunition Material market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Defence Ammunition Material market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Defence Ammunition Material market size and forecasts, by Material Family and by Application, in consumption value (\$ Million), 2021-2032

Global Defence Ammunition Material market shares of main players, in revenue (\$ Million), 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 Defence Ammunition Material

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 Defence Ammunition Material market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include EURENCO, Nitrochemie, General Dynamics Ordnance and Tactical Systems, BAE Systems, NITRO-CHEM, Thales Australia, Poongsan, Pakistan Ordnance Factories, Explosia, FORCIT, etc.

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

Market segmentation

Defence Ammunition Material market is split by Material Family and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Material Family and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Material Family

High Explosives

Propellants

Primer and Ignition Compositions

Pyrotechnic Materials

Combustible Charge Materials

Other Energetic Intermediates

Market segment by Functional Role

Main Charge Materials

Propulsion Materials

Other

Market segment by Application

Artillery Ammunition

Small-caliber Ammunition

Medium-caliber Ammunition

Mortar Ammunition

Tank Ammunition

Naval Ammunition

Specialty Munitions

Market segment by players, this report covers

EURENCO

Nitrochemie

General Dynamics Ordnance and Tactical Systems

BAE Systems

NITRO-CHEM

Thales Australia

Poongsan

Pakistan Ordnance Factories

Explosia

FORCIT

Solar Industries India

Milan Blagojevi? ? Namenska

MAXAM

Chemring Group

MKE

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Defence Ammunition Material product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Defence Ammunition Material, with revenue, gross margin, and global market share of Defence Ammunition Material from 2021 to 2026.

Chapter 3, the Defence Ammunition Material competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Material Family and by Application, with consumption value and growth rate by Material Family, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Defence Ammunition Material market forecast, by regions, by Material Family and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Defence Ammunition Material.

Chapter 13, to describe Defence Ammunition Material research findings and conclusion.

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