

Global Defence Ammunition Material Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Defence Ammunition Material market size is expected to reach \$ 5215 million by 2032, rising at a market growth of 1.9% CAGR during the forecast period (2026-2032).

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 studies the global Defence Ammunition Material demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Defence Ammunition Material, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Defence Ammunition Material that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Defence Ammunition Material total market, 2021-2032, (USD Million)

Global Defence Ammunition Material total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Defence Ammunition Material total market, key domestic companies, and share, (USD Million)

Global Defence Ammunition Material revenue by player, revenue and market share 2021-2026, (USD Million)

Global Defence Ammunition Material total market by Material Family, CAGR, 2021-2032, (USD Million)

Global Defence Ammunition Material total market by Application, CAGR, 2021-2032,

(USD Million)

This report profiles major 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Defence Ammunition Material market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Material Family, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Defence Ammunition Material Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Defence Ammunition Material Market, Segmentation by Material Family:

High Explosives

Propellants

Primer and Ignition Compositions

Pyrotechnic Materials

Combustible Charge Materials

Other Energetic Intermediates

Global Defence Ammunition Material Market, Segmentation by Functional Role:

Main Charge Materials

Propulsion Materials

Other

Global Defence Ammunition Material Market, Segmentation by Application:

Artillery Ammunition

Small-caliber Ammunition

Medium-caliber Ammunition

Mortar Ammunition

Tank Ammunition

Naval Ammunition

Specialty Munitions

Companies Profiled:

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

Key Questions Answered

1. How big is the global Defence Ammunition Material market?

2. What is the demand of the global Defence Ammunition Material market?
3. What is the year over year growth of the global Defence Ammunition Material market?
4. What is the total value of the global Defence Ammunition Material market?
5. Who are the Major Players in the global Defence Ammunition Material market?
6. What are the growth factors driving the market demand?

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