

Global Guided Ammunition Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Guided Ammunition market size is expected to reach \$ 32180 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

Guided munitions (PGMs) are disposable weaponized munitions that can acquire or update target information and implement trajectory corrections throughout or in the terminal phase of flight through inertial/GNSS, radar/infrared/laser, datalink, and other means to achieve high-precision impacts. Typical forms include precision-guided bombs (including small-diameter bombs and complete bombs with guidance and glide components), air-to-ground missiles, air-to-air missiles, tactical anti-ship missiles, surface-to-air missiles (including interceptors), anti-tank missiles, and guided rockets and artillery projectiles with guidance and correction capabilities. Their common characteristics are ammunition, disposable nature, and accuracy guaranteed by guidance/terminal guidance.

The global guided munitions industry is in a booming cycle of inventory replenishment and replacement, with sales projected at approximately \$18.152 billion in 2024. Structurally, the core sectors are surface-to-air and air-to-air, followed by anti-ship and air-to-ground. Precision-guided bombs, anti-tank, and guided rockets contribute primarily in terms of volume. The industry is highly concentrated, with the top five manufacturers holding approximately 60% of the market share. Lockheed Martin holds a commanding lead of approximately 30%, followed by Raytheon, Rostec, Boeing, and Kongsberg. Leading manufacturers leverage mid-to-high unit prices and long-term framework contracts to consolidate production capacity and bargaining power. On the supply side, production of bottleneck components such as propellants and seekers continues to expand. Layered air defense and air-to-air missile production lines in Europe and North America are accelerating significantly. Furthermore, maritime security

is driving continued activity in the tactical anti-ship and ship-to-air missile families. From the perspective of demand and price, the Army's air defense and long-range firepower inventory replenishment is supporting steady growth in sales. The Air Force, driven by its need for standoff and air superiority, is driving the delivery of high-value-added missiles. The Navy's initial integration and volume growth of coastal and ship-based air defense systems are driving average selling prices. Deeper integration and localization of the supply chain are accelerating, with some projects utilizing licensed production and local assembly to shorten lead times and mitigate compliance and logistics risks.

This report studies the global Guided Ammunition production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Guided Ammunition 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 Guided Ammunition that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Guided Ammunition total production and demand, 2021-2032, (K MT)

Global Guided Ammunition total production value, 2021-2032, (USD Million)

Global Guided Ammunition production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Guided Ammunition consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Guided Ammunition domestic production, consumption, key domestic manufacturers and share

Global Guided Ammunition production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Guided Ammunition production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Guided Ammunition production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Guided Ammunition market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Lockheed Martin, Raytheon, MBDA, Diehl Defence, Kongsberg, Hanwha Aerospace, LIG Nex1, Rafael, Israel Aerospace Industries, Boeing, 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 Guided Ammunition market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) by manufacturer, by Type, 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 Guided Ammunition Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Guided Ammunition Market, Segmentation by Type:

Precision-guided Bombs

Air-to-ground Missiles

Air-to-air Missiles

Anti-ship Missiles

Surface-to-air Missiles

Anti-tank Missiles

Guided Rockets(artillery Shells)

Others

Global Guided Ammunition Market, Segmentation by Guidance Method:

Inertial Guidance

Satellite Guidance (GPS/BeiDou/GLONASS)

Infrared Imaging Guidance (IIR)

Semi-Active Laser Guidance (SAL)

Active Radar Homing

Others

Global Guided Ammunition Market, Segmentation by Propulsion:

Unpowered Glide

Solid Rocket Propelled

Liquid Rocket Propelled

Turbojet / Ramjet Propelled

Others

Global Guided Ammunition Market, Segmentation by Application:

Air Force

Land Force

Navy

Companies Profiled:

Lockheed Martin

Raytheon

MBDA

Diehl Defence

Kongsberg

Hanwha Aerospace

LIG Nex1

Rafael

Israel Aerospace Industries

Boeing

Northrop Grumman

Roketsan

Almaz-Antey

Tactical Missiles Corporation

CASIC

AVIC

Key Questions Answered:

1. How big is the global Guided Ammunition market?
2. What is the demand of the global Guided Ammunition market?
3. What is the year over year growth of the global Guided Ammunition market?
4. What is the production and production value of the global Guided Ammunition market?
5. Who are the key producers in the global Guided Ammunition market?
6. What are the growth factors driving the market demand?

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