

# Global Artillery Shells with Caliber over 100mm Market Growth 2026-2032

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## Abstracts

The global Artillery Shells with Caliber over 100mm market size is predicted to grow from US\$ 17750 million in 2025 to US\$ 2997 million in 2032; it is expected to grow at a CAGR of -22.9% from 2026 to 2032.

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.

LP Information, Inc. (LPI) ' newest research report, the "Artillery Shells with Caliber over 100mm Industry Forecast" looks at past sales and reviews total world Artillery Shells with Caliber over 100mm sales in 2025, providing a comprehensive analysis by region and market sector of projected Artillery Shells with Caliber over 100mm sales for 2026 through 2032. With Artillery Shells with Caliber over 100mm sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Artillery Shells with Caliber over 100mm industry.

This Insight Report provides a comprehensive analysis of the global Artillery Shells with Caliber over 100mm landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Artillery Shells with Caliber over 100mm portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Artillery Shells with Caliber over 100mm market.

This Insight Report evaluates the key market trends, drivers, and affecting factors

shaping the global outlook for Artillery Shells with Caliber over 100mm and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Artillery Shells with Caliber over 100mm.

This report presents a comprehensive overview, market shares, and growth opportunities of Artillery Shells with Caliber over 100mm market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

155mm

152mm

122mm

105mm

Other

#### Segmentation by Application:

High-Explosive (HE)

Smoke

Illumination

Training Rounds

Other

This report also splits the market by region:

## Americas

United States

Canada

Mexico

Brazil

## APAC

China

Japan

Korea

Southeast Asia

India

Australia

## Europe

Germany

France

UK

Italy

Russia

## Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

General Dynamics

Nammo

KNDS

BAE Systems

Elbit Systems

Day & Zimmermann

Rheinmetall

Rostec

NORINCO

Poongsan Corporation

MESKO

MKE

### Key Questions Addressed in this Report

What is the 10-year outlook for the global Artillery Shells with Caliber over 100mm market?

What factors are driving Artillery Shells with Caliber over 100mm market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Artillery Shells with Caliber over 100mm market opportunities vary by end market size?

How does Artillery Shells with Caliber over 100mm break out by Type, by Application?

## Contents

### 1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

### 2 EXECUTIVE SUMMARY

#### 2.1 World Market Overview

- 2.1.1 Global Artillery Shells with Caliber over 100mm Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Artillery Shells with Caliber over 100mm by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Artillery Shells with Caliber over 100mm by Country/Region, 2021, 2025 & 2032

#### 2.2 Artillery Shells with Caliber over 100mm Segment by Type

- 2.2.1 155mm
- 2.2.2 152mm
- 2.2.3 122mm
- 2.2.4 105mm
- 2.2.5 Other
- 2.2.6 Artillery Shells with Caliber over 100mm Sales by Type
  - 2.2.6.1 Global Artillery Shells with Caliber over 100mm Sales Market Share by Type (2021-2026)
  - 2.2.6.2 Global Artillery Shells with Caliber over 100mm Revenue and Market Share by Type (2021-2026)
  - 2.2.6.3 Global Artillery Shells with Caliber over 100mm Sale Price by Type (2021-2026)

#### 2.3 Artillery Shells with Caliber over 100mm Segment by Application

- 2.3.1 High-Explosive (HE)
- 2.3.2 Smoke
- 2.3.3 Illumination
- 2.3.4 Training Rounds

### 2.3.5 Other

### 2.3.6 Artillery Shells with Caliber over 100mm Sales by Application

2.3.6.1 Global Artillery Shells with Caliber over 100mm Sale Market Share by Application (2021-2026)

2.3.6.2 Global Artillery Shells with Caliber over 100mm Revenue and Market Share by Application (2021-2026)

2.3.6.3 Global Artillery Shells with Caliber over 100mm Sale Price by Application (2021-2026)

## **3 GLOBAL BY COMPANY**

### 3.1 Global Artillery Shells with Caliber over 100mm Breakdown Data by Company

3.1.1 Global Artillery Shells with Caliber over 100mm Annual Sales by Company (2021-2026)

3.1.2 Global Artillery Shells with Caliber over 100mm Sales Market Share by Company (2021-2026)

3.2 Global Artillery Shells with Caliber over 100mm Annual Revenue by Company (2021-2026)

3.2.1 Global Artillery Shells with Caliber over 100mm Revenue by Company (2021-2026)

3.2.2 Global Artillery Shells with Caliber over 100mm Revenue Market Share by Company (2021-2026)

3.3 Global Artillery Shells with Caliber over 100mm Sale Price by Company

3.4 Key Manufacturers Artillery Shells with Caliber over 100mm Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Artillery Shells with Caliber over 100mm Product Location Distribution

3.4.2 Players Artillery Shells with Caliber over 100mm Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

## **4 WORLD HISTORIC REVIEW FOR ARTILLERY SHELLS WITH CALIBER OVER 100MM BY GEOGRAPHIC REGION**

4.1 World Historic Artillery Shells with Caliber over 100mm Market Size by Geographic Region (2021-2026)



4.1.1 Global Artillery Shells with Caliber over 100mm Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Artillery Shells with Caliber over 100mm Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Artillery Shells with Caliber over 100mm Market Size by Country/Region (2021-2026)

4.2.1 Global Artillery Shells with Caliber over 100mm Annual Sales by Country/Region (2021-2026)

4.2.2 Global Artillery Shells with Caliber over 100mm Annual Revenue by Country/Region (2021-2026)

4.3 Americas Artillery Shells with Caliber over 100mm Sales Growth

4.4 APAC Artillery Shells with Caliber over 100mm Sales Growth

4.5 Europe Artillery Shells with Caliber over 100mm Sales Growth

4.6 Middle East & Africa Artillery Shells with Caliber over 100mm Sales Growth

## **5 AMERICAS**

5.1 Americas Artillery Shells with Caliber over 100mm Sales by Country

5.1.1 Americas Artillery Shells with Caliber over 100mm Sales by Country (2021-2026)

5.1.2 Americas Artillery Shells with Caliber over 100mm Revenue by Country (2021-2026)

5.2 Americas Artillery Shells with Caliber over 100mm Sales by Type (2021-2026)

5.3 Americas Artillery Shells with Caliber over 100mm Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

## **6 APAC**

6.1 APAC Artillery Shells with Caliber over 100mm Sales by Region

6.1.1 APAC Artillery Shells with Caliber over 100mm Sales by Region (2021-2026)

6.1.2 APAC Artillery Shells with Caliber over 100mm Revenue by Region (2021-2026)

6.2 APAC Artillery Shells with Caliber over 100mm Sales by Type (2021-2026)

6.3 APAC Artillery Shells with Caliber over 100mm Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

## **7 EUROPE**

- 7.1 Europe Artillery Shells with Caliber over 100mm by Country
  - 7.1.1 Europe Artillery Shells with Caliber over 100mm Sales by Country (2021-2026)
  - 7.1.2 Europe Artillery Shells with Caliber over 100mm Revenue by Country (2021-2026)
- 7.2 Europe Artillery Shells with Caliber over 100mm Sales by Type (2021-2026)
- 7.3 Europe Artillery Shells with Caliber over 100mm Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

## **8 MIDDLE EAST & AFRICA**

- 8.1 Middle East & Africa Artillery Shells with Caliber over 100mm by Country
  - 8.1.1 Middle East & Africa Artillery Shells with Caliber over 100mm Sales by Country (2021-2026)
  - 8.1.2 Middle East & Africa Artillery Shells with Caliber over 100mm Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Artillery Shells with Caliber over 100mm Sales by Type (2021-2026)
- 8.3 Middle East & Africa Artillery Shells with Caliber over 100mm Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

## **9 MARKET DRIVERS, CHALLENGES AND TRENDS**

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks

### 9.3 Industry Trends

## **10 MANUFACTURING COST STRUCTURE ANALYSIS**

### 10.1 Raw Material and Suppliers

### 10.2 Manufacturing Cost Structure Analysis of Artillery Shells with Caliber over 100mm

### 10.3 Manufacturing Process Analysis of Artillery Shells with Caliber over 100mm

### 10.4 Industry Chain Structure of Artillery Shells with Caliber over 100mm

## **11 MARKETING, DISTRIBUTORS AND CUSTOMER**

### 11.1 Sales Channel

#### 11.1.1 Direct Channels

#### 11.1.2 Indirect Channels

### 11.2 Artillery Shells with Caliber over 100mm Distributors

### 11.3 Artillery Shells with Caliber over 100mm Customer

## **12 WORLD FORECAST REVIEW FOR ARTILLERY SHELLS WITH CALIBER OVER 100MM BY GEOGRAPHIC REGION**

### 12.1 Global Artillery Shells with Caliber over 100mm Market Size Forecast by Region

#### 12.1.1 Global Artillery Shells with Caliber over 100mm Forecast by Region (2027-2032)

#### 12.1.2 Global Artillery Shells with Caliber over 100mm Annual Revenue Forecast by Region (2027-2032)

### 12.2 Americas Forecast by Country (2027-2032)

### 12.3 APAC Forecast by Region (2027-2032)

### 12.4 Europe Forecast by Country (2027-2032)

### 12.5 Middle East & Africa Forecast by Country (2027-2032)

### 12.6 Global Artillery Shells with Caliber over 100mm Forecast by Type (2027-2032)

### 12.7 Global Artillery Shells with Caliber over 100mm Forecast by Application (2027-2032)

## **13 KEY PLAYERS ANALYSIS**

### 13.1 General Dynamics

#### 13.1.1 General Dynamics Company Information

#### 13.1.2 General Dynamics Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

13.1.3 General Dynamics Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 General Dynamics Main Business Overview

13.1.5 General Dynamics Latest Developments

13.2 Nammo

13.2.1 Nammo Company Information

13.2.2 Nammo Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

13.2.3 Nammo Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Nammo Main Business Overview

13.2.5 Nammo Latest Developments

13.3 KNDS

13.3.1 KNDS Company Information

13.3.2 KNDS Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

13.3.3 KNDS Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 KNDS Main Business Overview

13.3.5 KNDS Latest Developments

13.4 BAE Systems

13.4.1 BAE Systems Company Information

13.4.2 BAE Systems Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

13.4.3 BAE Systems Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 BAE Systems Main Business Overview

13.4.5 BAE Systems Latest Developments

13.5 Elbit Systems

13.5.1 Elbit Systems Company Information

13.5.2 Elbit Systems Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

13.5.3 Elbit Systems Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Elbit Systems Main Business Overview

13.5.5 Elbit Systems Latest Developments

13.6 Day & Zimmermann

13.6.1 Day & Zimmermann Company Information

13.6.2 Day & Zimmermann Artillery Shells with Caliber over 100mm Product Portfolios

## and Specifications

13.6.3 Day & Zimmermann Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Day & Zimmermann Main Business Overview

13.6.5 Day & Zimmermann Latest Developments

## 13.7 Rheinmetall

13.7.1 Rheinmetall Company Information

13.7.2 Rheinmetall Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

13.7.3 Rheinmetall Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Rheinmetall Main Business Overview

13.7.5 Rheinmetall Latest Developments

## 13.8 Rostec

13.8.1 Rostec Company Information

13.8.2 Rostec Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

13.8.3 Rostec Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Rostec Main Business Overview

13.8.5 Rostec Latest Developments

## 13.9 NORINCO

13.9.1 NORINCO Company Information

13.9.2 NORINCO Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

13.9.3 NORINCO Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 NORINCO Main Business Overview

13.9.5 NORINCO Latest Developments

## 13.10 Poongsan Corporation

13.10.1 Poongsan Corporation Company Information

13.10.2 Poongsan Corporation Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

13.10.3 Poongsan Corporation Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Poongsan Corporation Main Business Overview

13.10.5 Poongsan Corporation Latest Developments

## 13.11 MESKO

13.11.1 MESKO Company Information

13.11.2 MESKO Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

13.11.3 MESKO Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 MESKO Main Business Overview

13.11.5 MESKO Latest Developments

13.12 MKE

13.12.1 MKE Company Information

13.12.2 MKE Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

13.12.3 MKE Artillery Shells with Caliber over 100mm Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 MKE Main Business Overview

13.12.5 MKE Latest Developments

## **14 RESEARCH FINDINGS AND CONCLUSION**

## List Of Tables

### LIST OF TABLES

Table 1. Artillery Shells with Caliber over 100mm Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Artillery Shells with Caliber over 100mm Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of 155mm

Table 4. Major Players of 152mm

Table 5. Major Players of 122mm

Table 6. Major Players of 105mm

Table 7. Major Players of Other

Table 8. Global Artillery Shells with Caliber over 100mm Sales by Type (2021-2026) & (K Rounds)

Table 9. Global Artillery Shells with Caliber over 100mm Sales Market Share by Type (2021-2026)

Table 10. Global Artillery Shells with Caliber over 100mm Revenue by Type (2021-2026) & (\$ million)

Table 11. Global Artillery Shells with Caliber over 100mm Revenue Market Share by Type (2021-2026)

Table 12. Global Artillery Shells with Caliber over 100mm Sale Price by Type (2021-2026) & (US\$/Round)

Table 13. Global Artillery Shells with Caliber over 100mm Sale by Application (2021-2026) & (K Rounds)

Table 14. Global Artillery Shells with Caliber over 100mm Sale Market Share by Application (2021-2026)

Table 15. Global Artillery Shells with Caliber over 100mm Revenue by Application (2021-2026) & (\$ million)

Table 16. Global Artillery Shells with Caliber over 100mm Revenue Market Share by Application (2021-2026)

Table 17. Global Artillery Shells with Caliber over 100mm Sale Price by Application (2021-2026) & (US\$/Round)

Table 18. Global Artillery Shells with Caliber over 100mm Sales by Company (2021-2026) & (K Rounds)

Table 19. Global Artillery Shells with Caliber over 100mm Sales Market Share by Company (2021-2026)

Table 20. Global Artillery Shells with Caliber over 100mm Revenue by Company (2021-2026) & (\$ millions)



Table 21. Global Artillery Shells with Caliber over 100mm Revenue Market Share by Company (2021-2026)

Table 22. Global Artillery Shells with Caliber over 100mm Sale Price by Company (2021-2026) & (US\$/Round)

Table 23. Key Manufacturers Artillery Shells with Caliber over 100mm Producing Area Distribution and Sales Area

Table 24. Players Artillery Shells with Caliber over 100mm Products Offered

Table 25. Artillery Shells with Caliber over 100mm Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 26. New Products and Potential Entrants

Table 27. Market M&A Activity & Strategy

Table 28. Global Artillery Shells with Caliber over 100mm Sales by Geographic Region (2021-2026) & (K Rounds)

Table 29. Global Artillery Shells with Caliber over 100mm Sales Market Share Geographic Region (2021-2026)

Table 30. Global Artillery Shells with Caliber over 100mm Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 31. Global Artillery Shells with Caliber over 100mm Revenue Market Share by Geographic Region (2021-2026)

Table 32. Global Artillery Shells with Caliber over 100mm Sales by Country/Region (2021-2026) & (K Rounds)

Table 33. Global Artillery Shells with Caliber over 100mm Sales Market Share by Country/Region (2021-2026)

Table 34. Global Artillery Shells with Caliber over 100mm Revenue by Country/Region (2021-2026) & (\$ millions)

Table 35. Global Artillery Shells with Caliber over 100mm Revenue Market Share by Country/Region (2021-2026)

Table 36. Americas Artillery Shells with Caliber over 100mm Sales by Country (2021-2026) & (K Rounds)

Table 37. Americas Artillery Shells with Caliber over 100mm Sales Market Share by Country (2021-2026)

Table 38. Americas Artillery Shells with Caliber over 100mm Revenue by Country (2021-2026) & (\$ millions)

Table 39. Americas Artillery Shells with Caliber over 100mm Sales by Type (2021-2026) & (K Rounds)

Table 40. Americas Artillery Shells with Caliber over 100mm Sales by Application (2021-2026) & (K Rounds)

Table 41. APAC Artillery Shells with Caliber over 100mm Sales by Region (2021-2026) & (K Rounds)



Table 42. APAC Artillery Shells with Caliber over 100mm Sales Market Share by Region (2021-2026)

Table 43. APAC Artillery Shells with Caliber over 100mm Revenue by Region (2021-2026) & (\$ millions)

Table 44. APAC Artillery Shells with Caliber over 100mm Sales by Type (2021-2026) & (K Rounds)

Table 45. APAC Artillery Shells with Caliber over 100mm Sales by Application (2021-2026) & (K Rounds)

Table 46. Europe Artillery Shells with Caliber over 100mm Sales by Country (2021-2026) & (K Rounds)

Table 47. Europe Artillery Shells with Caliber over 100mm Revenue by Country (2021-2026) & (\$ millions)

Table 48. Europe Artillery Shells with Caliber over 100mm Sales by Type (2021-2026) & (K Rounds)

Table 49. Europe Artillery Shells with Caliber over 100mm Sales by Application (2021-2026) & (K Rounds)

Table 50. Middle East & Africa Artillery Shells with Caliber over 100mm Sales by Country (2021-2026) & (K Rounds)

Table 51. Middle East & Africa Artillery Shells with Caliber over 100mm Revenue Market Share by Country (2021-2026)

Table 52. Middle East & Africa Artillery Shells with Caliber over 100mm Sales by Type (2021-2026) & (K Rounds)

Table 53. Middle East & Africa Artillery Shells with Caliber over 100mm Sales by Application (2021-2026) & (K Rounds)

Table 54. Key Market Drivers & Growth Opportunities of Artillery Shells with Caliber over 100mm

Table 55. Key Market Challenges & Risks of Artillery Shells with Caliber over 100mm

Table 56. Key Industry Trends of Artillery Shells with Caliber over 100mm

Table 57. Artillery Shells with Caliber over 100mm Raw Material

Table 58. Key Suppliers of Raw Materials

Table 59. Artillery Shells with Caliber over 100mm Distributors List

Table 60. Artillery Shells with Caliber over 100mm Customer List

Table 61. Global Artillery Shells with Caliber over 100mm Sales Forecast by Region (2027-2032) & (K Rounds)

Table 62. Global Artillery Shells with Caliber over 100mm Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 63. Americas Artillery Shells with Caliber over 100mm Sales Forecast by Country (2027-2032) & (K Rounds)

Table 64. Americas Artillery Shells with Caliber over 100mm Annual Revenue Forecast

by Country (2027-2032) & (\$ millions)

Table 65. APAC Artillery Shells with Caliber over 100mm Sales Forecast by Region (2027-2032) & (K Rounds)

Table 66. APAC Artillery Shells with Caliber over 100mm Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 67. Europe Artillery Shells with Caliber over 100mm Sales Forecast by Country (2027-2032) & (K Rounds)

Table 68. Europe Artillery Shells with Caliber over 100mm Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 69. Middle East & Africa Artillery Shells with Caliber over 100mm Sales Forecast by Country (2027-2032) & (K Rounds)

Table 70. Middle East & Africa Artillery Shells with Caliber over 100mm Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 71. Global Artillery Shells with Caliber over 100mm Sales Forecast by Type (2027-2032) & (K Rounds)

Table 72. Global Artillery Shells with Caliber over 100mm Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 73. Global Artillery Shells with Caliber over 100mm Sales Forecast by Application (2027-2032) & (K Rounds)

Table 74. Global Artillery Shells with Caliber over 100mm Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 75. General Dynamics Basic Information, Artillery Shells with Caliber over 100mm Manufacturing Base, Sales Area and Its Competitors

Table 76. General Dynamics Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 77. General Dynamics Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 78. General Dynamics Main Business

Table 79. General Dynamics Latest Developments

Table 80. Nammo Basic Information, Artillery Shells with Caliber over 100mm Manufacturing Base, Sales Area and Its Competitors

Table 81. Nammo Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 82. Nammo Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 83. Nammo Main Business

Table 84. Nammo Latest Developments

Table 85. KNDS Basic Information, Artillery Shells with Caliber over 100mm Manufacturing Base, Sales Area and Its Competitors

Table 86. KNDS Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 87. KNDS Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 88. KNDS Main Business

Table 89. KNDS Latest Developments

Table 90. BAE Systems Basic Information, Artillery Shells with Caliber over 100mm Manufacturing Base, Sales Area and Its Competitors

Table 91. BAE Systems Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 92. BAE Systems Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 93. BAE Systems Main Business

Table 94. BAE Systems Latest Developments

Table 95. Elbit Systems Basic Information, Artillery Shells with Caliber over 100mm Manufacturing Base, Sales Area and Its Competitors

Table 96. Elbit Systems Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 97. Elbit Systems Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 98. Elbit Systems Main Business

Table 99. Elbit Systems Latest Developments

Table 100. Day & Zimmermann Basic Information, Artillery Shells with Caliber over 100mm Manufacturing Base, Sales Area and Its Competitors

Table 101. Day & Zimmermann Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 102. Day & Zimmermann Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 103. Day & Zimmermann Main Business

Table 104. Day & Zimmermann Latest Developments

Table 105. Rheinmetall Basic Information, Artillery Shells with Caliber over 100mm Manufacturing Base, Sales Area and Its Competitors

Table 106. Rheinmetall Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 107. Rheinmetall Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 108. Rheinmetall Main Business

Table 109. Rheinmetall Latest Developments

Table 110. Rostec Basic Information, Artillery Shells with Caliber over 100mm

Manufacturing Base, Sales Area and Its Competitors

Table 111. Rostec Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 112. Rostec Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 113. Rostec Main Business

Table 114. Rostec Latest Developments

Table 115. NORINCO Basic Information, Artillery Shells with Caliber over 100mm Manufacturing Base, Sales Area and Its Competitors

Table 116. NORINCO Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 117. NORINCO Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 118. NORINCO Main Business

Table 119. NORINCO Latest Developments

Table 120. Poongsan Corporation Basic Information, Artillery Shells with Caliber over 100mm Manufacturing Base, Sales Area and Its Competitors

Table 121. Poongsan Corporation Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 122. Poongsan Corporation Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 123. Poongsan Corporation Main Business

Table 124. Poongsan Corporation Latest Developments

Table 125. MESKO Basic Information, Artillery Shells with Caliber over 100mm Manufacturing Base, Sales Area and Its Competitors

Table 126. MESKO Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 127. MESKO Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 128. MESKO Main Business

Table 129. MESKO Latest Developments

Table 130. MKE Basic Information, Artillery Shells with Caliber over 100mm Manufacturing Base, Sales Area and Its Competitors

Table 131. MKE Artillery Shells with Caliber over 100mm Product Portfolios and Specifications

Table 132. MKE Artillery Shells with Caliber over 100mm Sales (K Rounds), Revenue (\$ Million), Price (US\$/Round) and Gross Margin (2021-2026)

Table 133. MKE Main Business

Table 134. MKE Latest Developments



## List Of Figures

### LIST OF FIGURES

- Figure 1. Picture of Artillery Shells with Caliber over 100mm
- Figure 2. Artillery Shells with Caliber over 100mm Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Artillery Shells with Caliber over 100mm Sales Growth Rate 2021-2032 (K Rounds)
- Figure 7. Global Artillery Shells with Caliber over 100mm Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Artillery Shells with Caliber over 100mm Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Artillery Shells with Caliber over 100mm Sales Market Share by Country/Region (2025)
- Figure 10. Artillery Shells with Caliber over 100mm Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of 155mm
- Figure 12. Product Picture of 152mm
- Figure 13. Product Picture of 122mm
- Figure 14. Product Picture of 105mm
- Figure 15. Product Picture of Other
- Figure 16. Global Artillery Shells with Caliber over 100mm Sales Market Share by Type in 2026
- Figure 17. Global Artillery Shells with Caliber over 100mm Revenue Market Share by Type (2021-2026)
- Figure 18. Artillery Shells with Caliber over 100mm Consumed in High-Explosive (HE)
- Figure 19. Global Artillery Shells with Caliber over 100mm Market: High-Explosive (HE) (2021-2026) & (K Rounds)
- Figure 20. Artillery Shells with Caliber over 100mm Consumed in Smoke
- Figure 21. Global Artillery Shells with Caliber over 100mm Market: Smoke (2021-2026) & (K Rounds)
- Figure 22. Artillery Shells with Caliber over 100mm Consumed in Illumination
- Figure 23. Global Artillery Shells with Caliber over 100mm Market: Illumination (2021-2026) & (K Rounds)
- Figure 24. Artillery Shells with Caliber over 100mm Consumed in Training Rounds
- Figure 25. Global Artillery Shells with Caliber over 100mm Market: Training Rounds



(2021-2026) & (K Rounds)

Figure 26. Artillery Shells with Caliber over 100mm Consumed in Other

Figure 27. Global Artillery Shells with Caliber over 100mm Market: Other (2021-2026) & (K Rounds)

Figure 28. Global Artillery Shells with Caliber over 100mm Sale Market Share by Application (2025)

Figure 29. Global Artillery Shells with Caliber over 100mm Revenue Market Share by Application in 2026

Figure 30. Artillery Shells with Caliber over 100mm Sales by Company in 2026 (K Rounds)

Figure 31. Global Artillery Shells with Caliber over 100mm Sales Market Share by Company in 2026

Figure 32. Artillery Shells with Caliber over 100mm Revenue by Company in 2026 (\$ millions)

Figure 33. Global Artillery Shells with Caliber over 100mm Revenue Market Share by Company in 2026

Figure 34. Global Artillery Shells with Caliber over 100mm Sales Market Share by Geographic Region (2021-2026)

Figure 35. Global Artillery Shells with Caliber over 100mm Revenue Market Share by Geographic Region in 2026

Figure 36. Americas Artillery Shells with Caliber over 100mm Sales 2021-2026 (K Rounds)

Figure 37. Americas Artillery Shells with Caliber over 100mm Revenue 2021-2026 (\$ millions)

Figure 38. APAC Artillery Shells with Caliber over 100mm Sales 2021-2026 (K Rounds)

Figure 39. APAC Artillery Shells with Caliber over 100mm Revenue 2021-2026 (\$ millions)

Figure 40. Europe Artillery Shells with Caliber over 100mm Sales 2021-2026 (K Rounds)

Figure 41. Europe Artillery Shells with Caliber over 100mm Revenue 2021-2026 (\$ millions)

Figure 42. Middle East & Africa Artillery Shells with Caliber over 100mm Sales 2021-2026 (K Rounds)

Figure 43. Middle East & Africa Artillery Shells with Caliber over 100mm Revenue 2021-2026 (\$ millions)

Figure 44. Americas Artillery Shells with Caliber over 100mm Sales Market Share by Country in 2026

Figure 45. Americas Artillery Shells with Caliber over 100mm Revenue Market Share by Country (2021-2026)

Figure 46. Americas Artillery Shells with Caliber over 100mm Sales Market Share by Type (2021-2026)

Figure 47. Americas Artillery Shells with Caliber over 100mm Sales Market Share by Application (2021-2026)

Figure 48. United States Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 49. Canada Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 50. Mexico Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 51. Brazil Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 52. APAC Artillery Shells with Caliber over 100mm Sales Market Share by Region in 2026

Figure 53. APAC Artillery Shells with Caliber over 100mm Revenue Market Share by Region (2021-2026)

Figure 54. APAC Artillery Shells with Caliber over 100mm Sales Market Share by Type (2021-2026)

Figure 55. APAC Artillery Shells with Caliber over 100mm Sales Market Share by Application (2021-2026)

Figure 56. China Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 57. Japan Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 58. South Korea Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 59. Southeast Asia Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 60. India Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 61. Australia Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 62. China Taiwan Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 63. Europe Artillery Shells with Caliber over 100mm Sales Market Share by Country in 2026

Figure 64. Europe Artillery Shells with Caliber over 100mm Revenue Market Share by Country (2021-2026)

Figure 65. Europe Artillery Shells with Caliber over 100mm Sales Market Share by Type



(2021-2026)

Figure 66. Europe Artillery Shells with Caliber over 100mm Sales Market Share by Application (2021-2026)

Figure 67. Germany Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 68. France Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 69. UK Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 70. Italy Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 71. Russia Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 72. Middle East & Africa Artillery Shells with Caliber over 100mm Sales Market Share by Country (2021-2026)

Figure 73. Middle East & Africa Artillery Shells with Caliber over 100mm Sales Market Share by Type (2021-2026)

Figure 74. Middle East & Africa Artillery Shells with Caliber over 100mm Sales Market Share by Application (2021-2026)

Figure 75. Egypt Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 76. South Africa Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 77. Israel Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 78. Turkey Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 79. GCC Countries Artillery Shells with Caliber over 100mm Revenue Growth 2021-2026 (\$ millions)

Figure 80. Manufacturing Cost Structure Analysis of Artillery Shells with Caliber over 100mm in 2026

Figure 81. Manufacturing Process Analysis of Artillery Shells with Caliber over 100mm

Figure 82. Industry Chain Structure of Artillery Shells with Caliber over 100mm

Figure 83. Channels of Distribution

Figure 84. Global Artillery Shells with Caliber over 100mm Sales Market Forecast by Region (2027-2032)

Figure 85. Global Artillery Shells with Caliber over 100mm Revenue Market Share Forecast by Region (2027-2032)

Figure 86. Global Artillery Shells with Caliber over 100mm Sales Market Share Forecast

by Type (2027-2032)

Figure 87. Global Artillery Shells with Caliber over 100mm Revenue Market Share

Forecast by Type (2027-2032)

Figure 88. Global Artillery Shells with Caliber over 100mm Sales Market Share Forecast

by Application (2027-2032)

Figure 89. Global Artillery Shells with Caliber over 100mm Revenue Market Share

Forecast by Application (2027-2032)

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