

Global Defence Ammunition Material Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/G505073ED149EN.html>

Date: July 2026

Pages: 117

Price: US\$ 3,660.00 (Single User License)

ID: G505073ED149EN

Abstracts

The global Defence Ammunition Material market size is predicted to grow from US\$ 4353 million in 2025 to US\$ 4992 million in 2032; it is expected to grow at a CAGR of 2.0% from 2026 to 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.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Defence Ammunition Material and breaks down the forecast by Material Family, 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 Defence Ammunition Material.

This report presents a comprehensive overview, market shares, and growth opportunities of Defence Ammunition Material market by product type, application, key players and key regions and countries.

Segmentation by Material Family:

High Explosives

Propellants

Primer and Ignition Compositions

Pyrotechnic Materials

Combustible Charge Materials

Other Energetic Intermediates

Segmentation by Functional Role:

Main Charge Materials

Propulsion Materials

Other

Segmentation by Application:

Artillery Ammunition

Small-caliber Ammunition

Medium-caliber Ammunition

Mortar Ammunition

Tank Ammunition

Naval Ammunition

Specialty Munitions

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 analyzing the company's coverage, product portfolio, its market penetration.

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

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