

# Soldier Modernisation - Market and Technology Forecast to 2030

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## Abstracts

Soldier modernisation focuses on providing soldiers with the necessary equipment and technologies that will make them future combat-ready. The soldier modernisation programs are conducted to enhance the capabilities of dismounted soldiers and bring effectiveness to army operations with a maximum survivability rate.

Soldier modernisation is a promising market for tech developers, especially in the field of open-source-based technology developers, SwaP-enabled component developers and integrators and cloud-based service providers. The markets will be growing for ruggedised computing systems that are easy to carry in a pocket or hands and have all the latest features and high-processing capabilities.

Public-Private initiatives are growing as soldier modernisation incorporates enterprise-grade solutions. To achieve these modern technologies all nations involved in soldier modernisation programmes are adapting commercial industries, start-ups, SMEs and research laboratories to develop modern products, components and services that will enable the ultimate goal of achieving modular, open-source but secured networks of sensor-based systems.

Interoperability is the upcoming trend where soldiers from different countries work as a team. For example NATO forces. When soldiers from different countries fight on behalf of NATO the simple need will be the devices they use should be of the same company or should be interoperable.

Therefore, all nations will be discarding the old devices for new wirelessly networked, modular, SwaP-enabled, and based on open-source architecture devices. Thus the market is huge. There are accelerated procurements of night vision systems, weapon or

head-mounted thermal weapon sites, and weapon-mounted laser-guided target systems that are gaining demand.

But it is not easy. For any nation, the number of dismounted soldiers is the largest of other Army domains. In such an era where most countries are following the soldier modernisation trend, it is obvious to see large quantity purchase orders. Therefore, while projecting the forecasts for soldier modernisation it becomes a bit of a challenge on spreading that bulk order over the forecasted period. We project such orders based on their nature of order such as definite-quantity contracts, requirements contracts, and indefinite-quantity contracts.

## Scope

**Overview:** Snapshot of the Soldier Modernisation Market during 2022 - 2030, including highlights of the demand drivers, trends, and challenges. It also provides a snapshot of the procurement plans concerning regions as well as components, types, and platforms. It sheds light on the emergence of new platforms like Integrated Visual Augmentation Systems (IVAS), next-generation Integrated Head Protection Systems (IHPS) and modular vests.

**Market Dynamics:** Insights into the technological developments in the protection materials, electronics, software and integration of emerging technologies such as C3 systems, nano-UAVs, machine learning, data analytics, and cyber-security and a detailed analysis of the changing preferences of soldier lethality, connectivity and performance metrics around the world. It also analyzes changing industry procurement structure and the challenges faced by the industry participants.

**Segment Analysis:** Insights into the Soldier Modernisation Market from a segmental perspective and a detailed analysis of factors influencing the market for each segment.

**Regional Review:** Insights into present Soldier Modernisation Programmes status and future developments for top countries within a region.

**Regional Analysis:** Insights into the Soldier Modernisation Market from a regional perspective and a detailed analysis of factors influencing the market for each region.

Trend Analysis - Key Defense Market: Analysis of the key markets in each region, providing an analysis of the Soldier Modernisation programmes expected to be initiated in each region.

Competitive landscape analysis: Analysis of the competitive landscape of the global defence industry participating in the development, testing, and fielding of various programmes under the soldier modernization drive. It provides an overview of key companies, together with insights such as product range, strategic partnerships and SWOT analysis.

## Segmentation

The market is segmented based on Region and by system, with sub segments by Vision System, Body Protection System, C3 System, Power System, and Weapons

### By Region

North America

Asia Pacific

Europe

APAC

Middle East and Africa

South America

### By System

Vision Systems

Night Vision Goggles

Thermal Sights

Laser Guided Target Systems

Body Protection System

Modular Armour

Armour Plates

Modular Helmet

Helmet Inserts

C3 Systems

SDRs

Handheld PNT

Handheld Computing Systems

Wireless Communication Systems

Personal Drones

Power System

Wearable Conformal Battery

Smart Fabric

Weapons

Assault Rifles

Pistols

Granade Launchers

Reasons to buy

Determine prospective procurement areas based on a detailed procurement plan analysis of the soldier modernisation market over the next eight years.

Gain an in-depth understanding of the underlying factors driving demand for different soldier modernization programmes in the leading countries and other potential markets across the world and identify the opportunities offered by each of them

Strengthen your understanding of the market in terms of demand drivers, industry trends, and the latest technological developments, among others.

Identify the major channels that are driving the global soldier modernisation Markets, providing a clear picture of future opportunities that can be tapped, resulting in revenue expansion.

Make correct business decisions based on a thorough analysis of the total competitive landscape of the sector with detailed profiles of the soldier

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