

Asia-Pacific (APAC) Missile Market by (Cruise, Ballistic, Interceptors, Anti-Tank, Anti-Ship, Submarine Launched Missiles), Component (Airframe, Guidance, Navigation, Control, Propulsion, Warhead, Battery), Speed, End User - Regional Forecast to 2030

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Abstracts

The Asia-Pacific (APAC) missile market is estimated to be USD 3.69 billion in 2025. It is projected to reach USD 6.26 billion by 2030 at a CAGR of 11.1%. Rising geopolitical friction across Asia Pacific has compelled regional governments to overhaul their missile inventories and bolster layered air and maritime defenses against advanced threats. India and South Korea are expanding their domestic manufacturing capabilities—integrating indigenously developed seeker heads and propulsion units into home-grown missile platforms to reduce reliance on external suppliers. Concurrently, strategic alliances with top European and American defense firms accelerate technology transfer, enabling local manufacturers to shorten development cycles and rapidly field state-of-the-art precision-strike systems.

“The supersonic segment is projected to lead the market during the forecast period”

By speed, the supersonic segment is projected to command the largest share of the market because supersonic missiles strike an optimal balance between cost, range, and survivability. They operate at Mach 1–Mach 5 speed—from coastal defense to medium-range strike—without the complexity and expense of hypersonic technology. Moreover, established production lines in India, South Korea, and Japan keep the unit costs of these missiles competitive. At the same time, propulsion subsystems ensure rapid fielding and interoperability with existing air and naval-defense networks. This combination of affordability, maturity, and tactical flexibility has driven widespread procurement of supersonic systems across the region.

“The navy segment is estimated to account for the largest share in 2025”

Naval forces dominate Asia Pacific missile procurement because the region’s vital sea lanes, offshore resources, and island chains demand robust maritime strike and defense capabilities. Coastal states—from China and India to Australia and Indonesia—invest heavily in ship-launched anti-ship, land-attack, and anti-air missiles to protect trade routes, deter naval incursions, and secure exclusive economic zones. Moreover, modern surface combatants and submarines increasingly rely on versatile missile systems for offensive reach and layered air defense, driving up volumes and spurring economies of scale in naval-specific production lines. This convergence of strategic necessity, fleet modernization, and high-volume requirements has driven the growth of the navy segment in the Asia-Pacific (APAC) missile market, by end user.

“India is projected to be the dominant player in the Asia-Pacific (APAC) missile market during the forecast period”

India’s ascent as an Asia-Pacific (APAC) missile market powerhouse rests on its sustained investment in indigenous R&D, a burgeoning private-sector manufacturing ecosystem, and an ambitious export agenda. Backed by one of the region’s fastest-growing defense budgets, India has fielded a family of home-grown systems—from the Akash surface-to-air missile to the BrahMos-II scramjet cruise missile—while forging technology partnerships with global leaders to bridge capability gaps. Initiatives like “Project Kusha” and the upcoming hypersonics corridor underscore India’s drive for self-reliance, even as its skilled supply chain and competitive cost structure position it to win contracts across Southeast Asia and beyond. This combination of technical depth, production scale, and export-ready solutions makes India uniquely qualified to lead growth in the Asia-Pacific (APAC) missile market.

The study contains insights from various industry experts, from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1–49%; Tier 2–37%; and Tier 3–14%

By Designation: C Level Executives–55%; Directors–27%; and Others–18%

RTX Corporation (US), Mitsubishi Heavy Industries Ltd. (Japan), LIG Nex1 (South Korea), MBDA (France), and Bharat Dynamics Limited (India) are some of the leading

players operating in the Asia-Pacific (APAC) missile market.

Research Coverage

This research report categorizes the Asia-Pacific (APAC) missile market based on type (surface-to-surface, surface-to-air, air-to-air, air-to-surface, subsea-to-surface), component (missile airframe; guidance, navigation & control; propulsion system; warhead section, power supply), speed (subsonic, supersonic and hypersonic), end user (Army, Navy, Airforce). These segments have been mapped across major regions: India, Japan, South Korea, Australia, Taiwan, Singapore, Indonesia, Vietnam, and the Rest of Asia Pacific. The report's scope covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the Asia-Pacific (APAC) missile market. A detailed analysis of the key industry players has provided insights into their business overviews, solutions & services, key strategies, contracts, joint ventures, partnerships & agreements, acquisitions, and product launches in this market. The report includes a competitive analysis of upcoming startups in the Asia-Pacific (APAC) missile market ecosystem.

Key Benefits of Buying this Report

This report will help market leaders/entrants with information on the closest approximations of the revenue numbers for the Asia-Pacific (APAC) missile market and its subsegments. It covers the entire market ecosystem and is expected to help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report will also help stakeholders understand the market's pulse and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on missiles offered by top players

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches

Market Development: Comprehensive information about lucrative markets across varied regions

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the Asia-Pacific (APAC) missile market

Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the Asia-Pacific (APAC) missile market

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