

# **Loitering Munition Market by Type (Recoverable and Expandable), End-user (Army, Navy, Airforce), Launching Mode (Air Launched, Vertical Take-Off, Catapult, Canister, Hand), Range and Region - Global Forecast to 2029**

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## **Abstracts**

The Loitering munition market is valued at USD 529.9 million in 2024 and is projected to reach USD 815.3 million by 2029, at a CAGR of 9.0% from 2024 to 2029. The increasing demand for precision strike capabilities within modern military operations remains a major driver of the market for loitering munitions. As conflict matures, armed forces tend to favor systems that allow the efficient engagement of fleeting targets, with minimal collateral damage, during modern military operations. In a loitering munition, operators can remain hovering over a battlefield to acquire real-time intelligence before targeting at the opportune time. This ability is particularly crucial in asymmetric war scenarios where the traditional ways of fighting are more dangerous. The focus on increasing operational efficiency and effectiveness has contributed to a rise in interest and investment in loitering munitions in many defense sectors, especially in special operations forces.

The other important push factor in this market is the rapid technological developments enhancing the ability of lasing munitions. Improved artificial intelligence, sensor technologies, and autonomous flight capabilities have dramatically enhanced the accuracy and reliability of these weapons. They have made these even more appealing for military forces all around the world. Indeed, the integration of these advanced technologies can make better target identification and engagement possible with decreased risks to personnel as well as higher mission success rates. Growing tensions among the world's nations as well as rising defense budgets across the globe are encouraging nations to improve their military arms, and this is positively influencing the

demand for state-of-the-art loitering munition systems which can help in gaining an upper hand in modern war situations.

“Based on type, the Expendable segment is projected to register the highest during the forecast period 2024-2029.”

The expendable segment by type of the loitering munition market is developing quickly, mainly due to the cost-effectiveness and operational advantages in modern warfare. Expendable loitering munitions are basically 'fire-and-forget' systems that have the capability to be used for once, making them suitable for a precision strike on high-value targets with minimal collateral damage. Light weight and deployable with quick response systems, it helps military forces to operate dynamically in different battlefield situations. The trends of asymmetric warfare, operations against an insurgency, and border protection have further intensified the utilization of expendable loitering munitions. Advanced technology, like improvements in sensor integration, AI and autonomous targetting, improve their precision and reliability making them the essential tool of modern warfare. Cost effectiveness in comparison to reusable systems also enables defense forces to buy and deploy them in huge numbers without causing a serious strain on their budget.

“Based on Launch mode, Canister launched segment is to lead the market during the forecast period 2024-2029.”

The canister segment within the loitering munition market is growing at a highly increasing rate due to flexibility in ease of deployment and adoption into a wide variety of combat situations. Compact portable canister-launched loitering munitions provide speedy response capabilities with precision strikes, and all of these can be released from ground vehicles, ships, aircraft, or even fixed platforms. The designs of these systems consist of safe storage, easy transportability, and quick launching capabilities that are of significance in the fast pace of today's efficiency-oriented battle environment.

Modern canister-launched systems are nowadays equipped with automation features, advanced target acquisition, and seamless interfacing with military platforms as a whole. Further, these systems are increasingly used to support swarm operations and network-centric warfare, which enables the launch of multiple munitions in a simultaneous manner to provide coordinated, high-impact strikes. As the defense forces look for agile, scalable, and effective solutions, canister-launched loitering munitions are emerging as the favorite choice, which will ensure that this segment keeps growing.

“The North America market is projected to contribute most significant share from 2024 to 2029 in the Loitering munition market.”

North America is emerging to be the growth driver of the loitering munitions market. The growth will drive through increases in defense spending, advances in technology, and a heavy emphasis on updating military capabilities. The US has been at the forefront, where it has aggressively invested in next-generation precision strike systems that would enhance operations and provide a strategic edge. There is a rising trend in the reliance of US military on high tech and cost-effective solutions, particularly on those like loitering munitions, as has been portrayed in a range of high-value contracts- for example, the AeroVironment's Switchblade systems, an important constituent part of its rising combat strategies.

It would depend solely on its robust defense setup consisting of its established players, Northrop Grumman, Raytheon Technologies, and AeroVironment. These players were investing in research and developments through efforts so that the next generation would be loitering with artificial intelligence, sensors at advanced levels, and through autonomous capabilities. Innovation-driven, such strategy would make North American forces come prepared to face challenges including asymmetric warfare and counterinsurgencies with speed and accuracy. The defense priorities are shifting to flexible, high-response systems that adapt as battlefield situations change. These munitions also provide some support for emerging warfare tactics such as swarm technology and network-centric operations.

The break-up of the profile of primary participants in the Loitering munition market:

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

By Designation: C Level – 55%, Director Level – 27%, and Others – 18%

By Region: North America – 32%, Europe – 32%, Asia Pacific – 16%, Latin America – 10%, ROW– 10%

Major companies profiled in the report include AeroVironment, inc (US), Thales (France), Elbit Systems LTD (Israel), Rheinmetall AG (Germany), Israel Aerospace Industries (Israel), Uvision (Israel), WB Group (Poland), AEVEX Aerospace (US), STM Savunma Teknolojileri M?hendislik ve Ticaret A.?. (Turkey), KNDS (Netherlands), Paramount Group (South Africa), EDGE PJSC Group (UAE), MBDA (France), Teledyne

FLIR Defense (US), RTX (US), Solar Group (India), Northrop Grumman (US), Anduril Industries (US) among others.

#### Research Coverage:

This market study covers the loitering munition market across various segments and subsegments. It aims to estimate this market's size and growth potential across different parts based on type (recoverable, expendable), End user( Army, Navy , Airforce), Launch mode (Air Launched Effect, Vertical Take-Off, Catapult Launcher, Canister Launcher , Hand Launched), Range (Short-range (100 Km)). and Region (North America, Europe, Asia Pacific, Middle East, Rest of the World).

This study also includes an in-depth competitive analysis of the key players in the market, their company profiles, key observations related to their product and business offerings, recent developments, and key market strategies they adopted.

#### Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall loitering munition market. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market Drivers (Technological Advancements as a Driver for Loitering Munitions, Defense Modernization Initiatives, Cost-Effectiveness and Versatility, Increasing Demand for Precision Strike Capabilities, Growth and Market Dynamics of Loitering Munitions in the UAV Sector), Restraints (High upfront costs of loitering munition systems, Operational Limitations, Regulatory Challenges) , Opportunities (Revolutionizing Border Security and Counter-Insurgency Operations, Countermeasures and Defensive Systems, Enhancing Naval Warfare and Maritime Surveillance) , and Challenges(Technical Limitations and Reliability Concerns, Potential threats to safety and violation of privacy, Countermeasures and Evolving Threats).

The report provides insights on the following pointers:

**Driver:** Rising demand for unmanned warhead drone to drive the market.

**Market Penetration:** Comprehensive information on loitering munition offered by the top players in the market

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product launches in the loitering munition market

**Market Development:** Comprehensive information about lucrative markets – the report analyses the loitering munition market across varied regions

**Market Diversification:** Exhaustive information about new products, untapped geographies, recent developments, and investments in the loitering munition market

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the loitering munition market

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