+357 96 030922
info@marketpublishers.com

Autonomous Weapon Moratorium Market Forecasts to 2032 – Global Analysis By Moratorium Type (Full Ban, Partial Ban and Regulation-only approach), Weapon Type (Lethal Autonomous Weapon Systems (LAWS), Non-Lethal Autonomous Systems and Other Weapon Types), Regulatory Framework, Platform, Level of Autonomy, Technology, End User and By Geography

https://marketpublishers.com/r/A8F5ABDFB19FEN.html
Date: September 2025
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: A8F5ABDFB19FEN

Abstracts

According to Stratistics MRC, the Global Autonomous Weapon Moratorium Market is accounted for $241.1 million in 2025 and is expected to reach $389.6 million by 2032 growing at a CAGR of 7.1% during the forecast period. Autonomous weapon moratorium is a formal suspension or restriction on the development, deployment, or use of weapon systems capable of operating without direct human control. It is typically proposed to allow time for ethical, legal, and technological assessments of such systems, which may include lethal autonomous weapons. The moratorium aims to prevent unintended consequences, ensure compliance with international humanitarian law, and promote responsible innovation. It is often advocated by policymakers, researchers, and civil society organizations concerned with global security.

According to the research group Automated Decision Research, as cited in the article Global Perspectives on Regulation by Autonomous Weapons Systems (2025), 66% of countries 129 out of 195 support the creation of legally binding instruments to regulate autonomous weapons, while only 6% oppose such measures, underscoring growing international momentum toward a moratorium or ban on fully autonomous systems

Market Dynamics:

+357 96 030922
info@marketpublishers.com

Driver:

Increasing risk of proliferation and an arms race

As these systems become more accessible, the potential for widespread proliferation among state and non-state actors increases, raising fears of destabilization and unintended escalation. The absence of universally binding regulations further fuels competitive development, prompting nations to invest heavily in AI-driven combat platforms. This race for strategic superiority is pushing policymakers to consider moratoriums to prevent unchecked expansion. The urgency to address ethical and geopolitical risks is becoming a central driver for market interventions.

Restraint:

Arguments for "more humane" warfare

Human rights organizations and ethicists argue that such systems lack the capacity for empathy, judgment, and accountability, which are essential in conflict scenarios. These debates are influencing international discourse, leading to calls for stricter oversight and potential bans. The tension between technological advancement and humanitarian principles is slowing adoption and encouraging restraint in deployment strategies by minimizing battlefield exposure, critics challenge this notion by emphasizing the moral ambiguity of delegating lethal decisions to machines.

Opportunity:

Civilian-military technology collaboration

Universities, research institutions, and private tech firms are increasingly collaborating with defense agencies to create transparent, ethically governed autonomous systems. This cross-sector engagement is fostering innovation in areas like sensor fusion, decision-making algorithms, and non-lethal deterrence technologies. Such partnerships are also helping shape policy frameworks that balance national security with ethical safeguards. The moratorium market stands to benefit from these synergies, as collaborative models promote accountability and public trust.

Threat:

Non-compliance and "go-it-alone" strategies

+357 96 030922
info@marketpublishers.com

Despite growing consensus on the need for regulation, some nations continue to pursue autonomous weapons independently, bypassing international norms. These unilateral approaches undermine collective efforts to establish moratoriums and raise the risk of regional instability. Additionally, the emergence of rogue actors and private military contractors deploying AI-enabled systems without oversight further complicates compliance. This fragmented landscape threatens the credibility and effectiveness of global moratorium initiatives.

Covid-19 Impact:

The pandemic disrupted defense supply chains and diverted government focus toward public health, temporarily slowing autonomous weapon development. However, it also accelerated digital transformation across sectors, including defense, where remote operations and unmanned systems gained traction. Budget reallocations delayed some moratorium discussions, but the crisis highlighted the importance of ethical governance in automated decision-making. The pandemic served as a catalyst for re-evaluating the role of AI in national security frameworks.

The non-lethal autonomous systems segment is expected to be the largest during the forecast period

The non-lethal autonomous systems segment is expected to account for the largest market share during the forecast period due to their utility in peacekeeping and border security operations. These systems offer strategic advantages without escalating conflict, making them more acceptable under emerging regulatory frameworks. Their versatility in reconnaissance, threat detection, and area denial applications is driving widespread adoption. Governments are increasingly favoring non-lethal solutions to maintain operational readiness while adhering to ethical constraints.

The regional treaties & bans segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the regional treaties & bans segment is predicted to witness the highest growth rate driven by heightened diplomatic efforts and multilateral agreements. Initiatives such as the European Parliament’s push for a ban on fully autonomous weapons and ASEAN’s regional dialogues are shaping policy landscapes. The segment’s growth is further supported by legal harmonization efforts and increased funding for verification mechanisms. As regional blocs take proactive stances, this

+357 96 030922
info@marketpublishers.com

segment is poised for accelerated expansion.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share owing to its advanced defense infrastructure, robust R&D capabilities, and active policy engagement. The U.S. Department of Defense's investments in ethical AI and autonomous systems, coupled with strong advocacy from civil society groups, are shaping the region's regulatory trajectory. Additionally, the region's strategic emphasis on responsible autonomy is driving demand for moratorium-related technologies and frameworks.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR fueled by rising geopolitical tensions and rapid technological adoption. Countries such as China, India, South Korea, and Japan are investing heavily in autonomous defense capabilities while simultaneously engaging in regional dialogues on regulation. The dual push for innovation and governance is creating fertile ground for moratorium initiatives. Moreover, public awareness and civil society activism are influencing national policies, prompting governments to explore balanced approaches.

Key players in the market

Some of the key players in Autonomous Weapon Moratorium Market include Anduril Industries, Palantir Technologies, Shield AI, Epirus, Helsing, Apptronik, AEye, Kodiak Robotics, General Dynamics, Northrop Grumman, Lockheed Martin, BAE Systems, Raytheon Technologies, Boeing Defense, Rafael Advanced Defense Systems, Elbit Systems, Thales Group, Leonardo S.p.A., Hanwha Aerospace, and AVIC (Aviation Industry Corporation of China).

Key Developments:

In August 2025, Palantir Technologies Fujitsu signed a licensing agreement for Palantir AIP in Japan, bundling AI capabilities into its Uvance business model and further cementing a strategic partnership for generative AI deployment across enterprise use cases.

In June 2025, Palantir Technologies Joined with Accenture Federal Services, aiming to

+357 96 030922
info@marketpublishers.com

modernize U.S. federal operations via AI, as well as launched a platform with The Nuclear Company to provisionly scale nuclear deployment systems.

In April 2025, Anduril publicly introduced Copperhead, a line of high-speed autonomous underwater vehicles (UUVs), including reusable kamikaze/munitions variants that can be mass-produced for large-scale deployment. It reflects a strategic move towards scalable undersea autonomy.

Moratorium Types Covered:

- Full Ban
- Partial Ban
- Regulation-only approach

Weapon Types Covered:

- Lethal Autonomous Weapon Systems (LAWS)
- Non-Lethal Autonomous Systems
- Other Weapon Types

Regulatory Frameworks Covered:

- International Moratorium Agreements
- Regional Treaties & Bans
- National-Level Regulations & Defense Policies
- NGO & Advocacy Group Campaigns
- Other Regulatory Frameworks

+357 96 030922
info@marketpublishers.com

Platforms Covered:

- Land-Based Autonomous Weapons
- Airborne Autonomous Weapons
- Naval Autonomous Weapons
- Space-Based Autonomous Systems
- Other Platforms

Level of Autonomies Covered:

- Human-out-of-the-loop (HOOTL)
- Human-on-the-loop (HOTL)
- Human-in-the-loop (HITL)

Technologies Covered:

- Command and Control Systems
- Artificial Intelligence & Machine Learning
- Computer Vision & Target Recognition
- Navigation & Guidance Systems
- Communication & Networking Systems
- Sensors & Detection Technologies
- Other Technologies

+357 96 030922
info@marketpublishers.com

End Users Covered:

- Defense & Military Organizations
- Intelligence Agencies
- International Organizations & Coalitions
- Private Defense Contractors
- Homeland Security & Law Enforcement
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe

+357 96 030922
info@marketpublishers.com

- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific
- South America
  - Argentina
  - Brazil
  - Chile
  - Rest of South America
- Middle East & Africa
  - Saudi Arabia
  - UAE
  - Qatar
  - South Africa
  - Rest of Middle East & Africa

+357 96 030922
info@marketpublishers.com

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

+357 96 030922
info@marketpublishers.com

Contents

+357 96 030922
info@marketpublishers.com

+357 96 030922
info@marketpublishers.com

+357 96 030922
info@marketpublishers.com

12 GLOBAL AUTONOMOUS WEAPON MORATORIUM MARKET, BY GEOGRAPHY

13 KEY DEVELOPMENTS

+357 96 030922
info@marketpublishers.com

14 COMPANY PROFILING

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

+357 96 030922
info@marketpublishers.com

+357 96 030922
info@marketpublishers.com

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

+357 96 030922
info@marketpublishers.com

I would like to order

Product name: Autonomous Weapon Moratorium Market Forecasts to 2032 – Global Analysis By Moratorium Type (Full Ban, Partial Ban and Regulation-only approach), Weapon Type (Lethal Autonomous Weapon Systems (LAWS), Non-Lethal Autonomous Systems and Other Weapon Types), Regulatory Framework, Platform, Level of Autonomy, Technology, End User and By Geography

Product link: https://marketpublishers.com/r/A8F5ABDFB19FEN.html

Price: US$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:
info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page https://marketpublishers.com/r/A8F5ABDFB19FEN.html