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Hypersonic Weapons and Vehicles Market Forecasts to 2034 – Global Analysis By Type (Hypersonic Glide Vehicles (HGVs), Hypersonic Cruise Missiles (HCMs), Hypersonic Ballistic Missiles, Reusable Hypersonic Vehicles, and Hypersonic Spaceplanes), Launch Mode, Range, Propulsion Type, Component, End User and By Geography

https://marketpublishers.com/r/HA8A58E1DBA4EN.html
Date: June 2026
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: HA8A58E1DBA4EN

Abstracts

According to Stratistics MRC, the Global Hypersonic Weapons and Vehicles Market is accounted for $9.8 billion in 2026 and is expected to reach $26.4 billion by 2034, growing at a CAGR of 13.2% during the forecast period. Hypersonic weapons and vehicles are aerospace systems capable of sustained flight at speeds exceeding Mach 5, utilizing aerodynamic lift for maneuvering throughout their flight trajectory. This category encompasses hypersonic glide vehicles, which are launched on ballistic missiles and then glide to target using aerodynamic surfaces; hypersonic cruise missiles powered by scramjet or ramjet engines; and reusable hypersonic research vehicles.

Market Dynamics:

Driver:

Intensifying great power competition accelerating hypersonic weapons development

The deployment of hypersonic weapons by China and Russia has created a compelling strategic rationale for the United States and its allies to accelerate their own hypersonic programs to avoid capability gaps. China has fielded the DF-17 hypersonic glide vehicle system and Russia has deployed the Kinzhal and Avangard hypersonic systems,

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fundamentally challenging the adequacy of existing ballistic missile defenses. This strategic competition is driving unprecedented hypersonic research and procurement budgets across the United States, Australia, United Kingdom, France, India, and Japan. National security imperatives override normal budget constraints, creating a sustained funding environment that is largely insulated from defense budget pressures affecting conventional weapons programs.

Restraint:

Extreme technical complexity and high development failure rates

Developing hypersonic systems that function reliably in the extreme thermal and aerodynamic environment of sustained Mach 5+ flight presents some of the most demanding engineering challenges in aerospace. Thermal protection systems must withstand temperatures exceeding 2000 degrees Celsius while maintaining structural integrity and aerodynamic shape. Scramjet propulsion requires precise fuel injection and combustion management in supersonic airflows within millisecond timescales. Guidance systems must function through plasma sheaths that interrupt conventional radio frequency communications. These challenges result in high developmental test failure rates and extended program timelines that drive cost growth and schedule delays, moderating near-term procurement volumes even as strategic demand remains strong.

Opportunity:

Reusable hypersonic vehicles enabling commercial point-to-point transportation

Beyond military applications, reusable hypersonic vehicles present a significant long-term commercial opportunity for ultra-high-speed point-to-point transportation. A hypersonic airliner capable of flying between London and Sydney in under three hours would represent a transformational premium transport service for business travelers and time-sensitive cargo. Several commercial ventures are advancing reusable hypersonic transport concepts with investment from government agencies and private capital. Technology spillovers from military hypersonic programs in materials science, propulsion, and thermal management are accelerating the commercial development timeline. While commercial hypersonic transport remains a decade or more from operational deployment, the opportunity represents a substantial future market for hypersonic vehicle developers and component suppliers.

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Threat:

Arms control and international security implications threatening export markets

The proliferation of hypersonic weapons capabilities raises significant arms control concerns that could result in new treaty frameworks restricting technology transfer, export licensing, and international cooperation. The United States, Russia, and China are unlikely to reach binding arms control agreements on hypersonic systems in the near term, but allied nations and potential customers face increasing pressure from great power relationships that constrain their procurement options. Export control restrictions on hypersonic-relevant technologies, including advanced thermal protection materials, scramjet propulsion components, and precision guidance systems, limit the addressable international market for Western hypersonic developers and reduce the commercial viability of programs that depend on export sales to achieve economic scale.

Covid-19 Impact:

The COVID-19 pandemic had minimal impact on hypersonic weapons program spending, as these programs are classified as national security priorities and funded through dedicated defense accounts largely insulated from broader fiscal austerity. In some cases, the pandemic indirectly accelerated hypersonic development by reinforcing geopolitical competition dynamics as great powers emerged from the crisis in adversarial economic and diplomatic postures. Defense funding for hypersonic programs in the United States, China, Russia, and allied nations has grown consistently throughout and after the pandemic period, reflecting the sustained strategic priority accorded to these capabilities by defense planning establishments globally.

The Hypersonic Glide Vehicles (HGVs) segment is expected to be the largest during the forecast period

The Hypersonic Glide Vehicles (HGVs) segment is expected to account for the largest market share during the forecast period. HGVs represent the most operationally mature hypersonic weapon category, with China and Russia having fielded operational systems and the United States advancing multiple HGV programs toward deployment. Their boost-glide flight profile, which launches on an existing ballistic missile booster before transitioning to gliding flight, provides a near-term development pathway that leverages proven launch infrastructure while delivering the speed and maneuverability advantages of hypersonic flight. Defense procurement budgets for HGV systems are substantial

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across major military powers, anchoring segment revenue leadership.

The Hypersonic Cruise Missiles (HCMs) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Hypersonic Cruise Missiles (HCMs) segment is predicted to witness the highest growth rate. While currently less mature than glide vehicles, scramjet-powered cruise missiles offer the operational advantage of sustained powered flight, enabling active maneuvering throughout the engagement envelope without deceleration from unpowered gliding. As propulsion maturity improves and production costs reduce, HCM procurement is projected to expand rapidly from the current development phase into operational deployment.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, reflecting the scale of U.S. defense investment in hypersonic research, development, and early procurement. The United States has launched an all-of-government approach to hypersonic development with major programs distributed across the Army, Navy, and Air Force, each advancing distinct hypersonic system concepts. Industry partners including Lockheed Martin, Northrop Grumman, RTX, and Boeing are developing competing and complementary hypersonic solutions, supported by a robust national laboratory and university research ecosystem that sustains the technology base.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. China is widely recognized as the current global leader in deployed hypersonic capabilities and continues to invest in next-generation systems. India has operationally deployed the BrahMos-II hypersonic missile program and is advancing indigenous hypersonic glide vehicle development. Japan and Australia are investing in hypersonic programs as part of alliance-driven defense modernization. South Korea is funding hypersonic research as a long-term strategic capability priority. The convergence of strategic competition and national defense modernization agendas drives the highest regional growth trajectory.

Key players in the market

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Some of the key players in Hypersonic Weapons and Vehicles Market include Lockheed Martin Corporation, Northrop Grumman Corporation, RTX Corporation, The Boeing Company, BAE Systems plc, L3Harris Technologies Inc., Leidos Holdings Inc., General Dynamics Corporation, Thales Group, MBDA, Kratos Defense & Security Solutions Inc., Leonardo S.p.A., Mitsubishi Heavy Industries Ltd., China Aerospace Science and Technology Corporation, and Rafael Advanced Defense Systems Ltd.

Key Developments:

In April 2026, MBDA announced it had secured contracts from France and Germany under the joint ASMP-E hypersonic successor program to initiate detailed design of a dual-capable air-launched hypersonic cruise missile. The program is expected to enter an engineering and manufacturing development phase in 2027, with initial operational deliveries to French and German air forces projected from 2032 onward.

In February 2026, Lockheed Martin successfully completed a flight test of its LRHW Long Range Hypersonic Weapon program for the U.S. Army, achieving the mission objectives related to range, speed, and terminal accuracy. The test validated the hypersonic glide body design and thermal protection system performance, clearing a key milestone toward initial operational capability targeted for 2027.

Types Covered:

- Hypersonic Glide Vehicles (HGVs)
- Hypersonic Cruise Missiles (HCMs)
- Hypersonic Ballistic Missiles
- Reusable Hypersonic Vehicles
- Hypersonic Spaceplanes

Launch Modes Covered:

- Air-Launched
- Surface-Launched

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Sea-Launched

Submarine-Launched

Ranges Covered:

Short Range

Medium Range

Intermediate Range

Intercontinental Range

Propulsion Types Covered:

Scramjet Engines

Ramjet Engines

Rocket Propulsion

Combined Cycle Propulsion

Components Covered:

Guidance and Navigation Systems

Propulsion Systems

Aerostructures

Thermal Protection Systems

Avionics and Control Systems

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- Payload Systems

End Users Covered:

- Defense and Military
- Space Agencies
- Research Organizations

Regions Covered:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - United Kingdom
  - Germany
  - France
  - Italy
  - Spain
  - Netherlands
  - Belgium

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- Sweden
- Switzerland
- Poland
- Rest of Europe

Asia Pacific

- China
- Japan
- India
- South Korea
- Australia
- Indonesia
- Thailand
- Malaysia
- Singapore
- Vietnam
- Rest of Asia Pacific

South America

- Brazil
- Argentina
- Colombia

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- Chile
- Peru
- Rest of South America

Rest of the World (RoW)

- Middle East
  - Saudi Arabia
  - United Arab Emirates
  - Qatar
  - Israel
  - Rest of Middle East
- Africa
  - South Africa
  - Egypt
  - Morocco
  - Rest of Africa

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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

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- 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

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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) are also represented in the same manner as above.

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