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Large Caliber Ammunition Market Forecasts to 2030 – Global Analysis By Ammunition Type (Armor-Piercing (AP), High-Explosive Anti-Tank (HEAT), High-Explosive Squash Head (HESH), Smoke & Illumination Rounds, Guided & Precision Ammunition, Cluster & Fragmentation Munitions, Practice & Training Rounds, and Other Ammunition Types), Caliber Size, Guidance Mechanism, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Large Caliber Ammunition Market is accounted for $7.92 billion in 2024 and is expected to reach $11.85 billion by 2030 growing at a CAGR of 8.5% during the forecast period. Large caliber ammunition refers to projectiles and cartridges with a diameter typically greater than 20mm, used in heavy weaponry such as artillery, tank guns, naval guns, and anti-aircraft systems. These munitions include high-explosive, armor-piercing, incendiary, and guided shells, designed for maximum impact against armored vehicles, fortifications, and personnel. Military and defense sectors primarily use them in combat and training scenarios for superior firepower and tactical advantage.

According to Grifford's Law Center, buyers had to undergo background checks to get ammunition and firearm licenses in the states of New Jersey, Illinois, Connecticut, and Massachusetts.

Market Dynamics:

Driver:

Increasing defense expenditure

Rising geopolitical tensions drive nations to expand their arsenals, boosting demand for precision-guided and high-explosive rounds. Higher budgets allow for the development of next-generation artillery shells, tank rounds, and naval ammunition, enhancing firepower and combat effectiveness. Additionally, funding supports domestic manufacturing and technological innovations, reducing dependency on imports. As military modernization accelerates globally, sustained defense spending ensures a steady demand for large caliber ammunition.

Restraint:

Stringent regulatory policies

Large caliber ammunition faces stringent regulatory policies due to its destructive potential, security concerns, and environmental impact. Governments enforce strict export controls, arms trade agreements, and environmental restrictions to prevent misuse, proliferation, and ecological damage. Compliance with these regulations increases production costs, delays procurement, and limits international sales, hampering market growth.

Opportunity:

Growing demand for artillery and tank ammunition

Modern military strategies emphasize enhanced firepower, precision strikes, and long-range capabilities, requiring advanced high-caliber rounds. Geopolitical tensions and conflicts further fuel demand as nations strengthen their defense capabilities. Additionally, military modernization programs, including next-generation tank and artillery upgrades, necessitate new munitions with improved lethality and accuracy. The rise of smart and guided ammunition also contributes to market growth, as armed forces seek more effective and cost-efficient solutions.

Threat:

High production and maintenance costs

Large caliber ammunition incurs high production and maintenance costs due to expensive raw materials, such as specialized metals, explosives, and propellants. Advanced manufacturing processes, including precision engineering and testing, further drive-up costs. Additionally, storage and maintenance require specialized facilities to ensure safety and longevity, increasing operational expenses. Therefore, these high costs hamper market growth by limiting procurement.

Covid-19 Impact:

The covid-19 pandemic disrupted the large caliber ammunition market through supply chain interruptions, raw material shortages, and production delays. Lockdowns and restrictions affected manufacturing, while defense budgets in some regions were reallocated to healthcare. Post-pandemic recovery saw increased defense spending and modernization efforts, driving market growth. The crisis also accelerated technological advancements, with nations prioritizing domestic production to reduce dependence on foreign supply chains.

The riot control segment is expected to be the largest during the forecast period

The riot control segment is expected to account for the largest market share during the forecast period. Large caliber ammunition in riot control includes non-lethal and less-lethal rounds such as rubber bullets, tear gas canisters, and flashbang grenades. Designed to minimize fatalities while ensuring compliance, they are fired from specialized launchers or modified artillery systems.

The air force segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the air force segment is predicted to witness the highest growth rate. In air force applications, large caliber ammunition is primarily used in aircraft cannons, anti-aircraft defense systems, and ground attack missions. Additionally, anti-aircraft artillery employs large-caliber munitions to counter aerial threats. Advancements in guided and explosive rounds enhance accuracy and lethality, ensuring air superiority in modern combat scenarios.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to the rising defense budgets, military modernization, and geopolitical tensions, particularly in China, India, Japan, and South Korea. Nations in the region are upgrading their artillery, tanks, and naval forces, increasing demand for advanced munitions. Border disputes, especially between India-China and in the South China Sea, fuel procurement. Technological advancements, including precision-guided munitions, further boost market growth.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, driven by high defense spending, military modernization, and ongoing research in advanced munitions. The U.S. Army and Marine Corps continually invest in next-generation artillery, tank rounds, and naval ammunition. Key manufacturers like General Dynamics and Northrop Grumman lead innovation in smart and precision-guided munitions. The demand is fueled by global military commitments, NATO obligations, and rising geopolitical tensions.

Key players in the market

Some of the key players in Large Caliber Ammunition market include BAE Systems, Northrop Grumman Corporation, General Dynamics Corporation, Rheinmetall AG, Thales Group, Nexter Group KNDS, Saab AB, Singapore Technologies Engineering Ltd., Kongsberg Gruppen ASA, American Ordnance LLC, IMBEL, EMGEPRON, Olin Corporation, Poongsan Corporation, RUAG Ammotec, Elbit Systems Ltd., Denel SOC Ltd., FN Herstal, CBC Global Ammunition and Nammo AS.

Key Developments:

In December 2024, General Dynamics Corporation announced that, the U.S. Army approved their M1147 120mm Advanced Multi-Purpose (AMP) round for full-rate production, marking a significant advancement for the M1 Abrams Main Battle Tank. This versatility enables Abrams tanks to adapt swiftly to diverse combat scenarios without the need to switch ammunition types.

In January 2024, Northrop Grumman announced the completion of production and delivery of the M829A4 120mm armor-piercing, fin-stabilized, discarding sabot (APFSDS) cartridges to the U.S. Army. Designed for the Abrams M1A2 SEPv3 main battle tank, the M829A4 enhances lethality against advanced armored threats.

Ammunition Types Covered:

- Armor-Piercing (AP)

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High-Explosive Anti-Tank (HEAT)

High-Explosive Squash Head (HESH)

Smoke & Illumination Rounds

Guided & Precision Ammunition

Cluster & Fragmentation Munitions

Practice & Training Rounds

Other Ammunition Types

Caliber Sizes Covered:

Large Caliber (40mm – 100mm)

Very Large Caliber (Above 100mm)

Guidance Mechanisms Covered:

Conventional Ammunition

Smart Ammunition

Applications Covered:

Riot Control

Anti-materiel Rounds

Hunting & Sporting

Fireworks & Pyrotechnics

Artillery

Other Applications

End Users Covered:

Army

Navy

Air Force

Special Forces

Paramilitary & Law Enforcement

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

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France

Spain

Rest of Europe

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

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 2022, 2023, 2024, 2026, and 2030
- 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

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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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Contents

5 GLOBAL LARGE CALIBER AMMUNITION MARKET, BY AMMUNITION TYPE

5.1 Introduction
5.2 Armor-Piercing (AP)
5.3 High-Explosive Anti-Tank (HEAT)
5.4 High-Explosive Squash Head (HESH)
5.5 Smoke & Illumination Rounds
5.6 Guided & Precision Ammunition
5.7 Cluster & Fragmentation Munitions
5.8 Practice & Training Rounds
5.9 Other Ammunition Types

6 GLOBAL LARGE CALIBER AMMUNITION MARKET, BY CALIBER SIZE

6.1 Introduction
6.2 Large Caliber (40mm – 100mm)
6.3 Very Large Caliber (Above 100mm)

7 GLOBAL LARGE CALIBER AMMUNITION MARKET, BY GUIDANCE MECHANISM

7.1 Introduction
7.2 Conventional Ammunition
7.3 Smart Ammunition

8 GLOBAL LARGE CALIBER AMMUNITION MARKET, BY APPLICATION

8.1 Introduction
8.2 Riot Control
8.3 Anti-materiel Rounds
8.4 Hunting & Sporting
8.5 Fireworks & Pyrotechnics
8.6 Artillery
8.7 Other Applications

9 GLOBAL LARGE CALIBER AMMUNITION MARKET, BY END USER

9.1 Introduction
9.2 Army
9.3 Navy

10 GLOBAL LARGE CALIBER AMMUNITION MARKET, BY GEOGRAPHY

11 KEY DEVELOPMENTS

11.1 Agreements, Partnerships, Collaborations and Joint Ventures
11.2 Acquisitions & Mergers
11.3 New Product Launch
11.4 Expansions
11.5 Other Key Strategies

12 COMPANY PROFILING

12.1 BAE Systems
12.2 Northrop Grumman Corporation
12.3 General Dynamics Corporation
12.4 Rheinmetall AG
12.5 Thales Group
12.6 Nexter Group KNDS
12.7 Saab AB
12.8 Singapore Technologies Engineering Ltd.
12.9 Kongsberg Gruppen ASA
12.10 American Ordnance LLC
12.11 IMBEL
12.12 EMGEPRON
12.13 Olin Corporation
12.14 Poongsan Corporation
12.15 RUAG Ammotec
12.16 Elbit Systems Ltd.
12.17 Denel SOC Ltd.
12.18 FN Herstal
12.19 CBC Global Ammunition
12.20 Nammo AS

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List Of Tables

LIST OF TABLES

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

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