

Consolidated Region 30mm Ammunition Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Caliber (20mm, 25mm, 30mm, 40mm, Other), By Ammunition Type (High Explosive Incendiary (HEI), High Explosive Incendiary - Tracer (HEI-T), High Explosive Incendiary/Tracer - Self Destruct (HEI/T-S.D.), Semi-Armor Piercing High Explosive Incendiary-Tracer/Self Destruct, Others), By Platform (Airborne, Naval, Land), By Region & Competition, 2021-2031F

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Abstracts

The Global Consolidated Region 30mm Ammunition Market is projected to expand from USD 3.73 Billion in 2025 to USD 5.17 Billion by 2031, registering a CAGR of 5.59%. This market consists of medium-caliber cartridges used in autocannons and rotary cannons to target light armor, aerial drones, and fortified positions across land, air, and naval environments. Key growth drivers include the urgent need to restock depleted national inventories amid rising geopolitical instability and the broad modernization of armored vehicle fleets seeking improved lethality, creating a structural foundation for expansion beyond temporary trends.

According to the Aerospace, Security and Defence Industries Association of Europe, defense sector turnover rose by 13.8 percent in 2024, spurred by heightened military preparedness and support for active conflict zones. Despite this upward trajectory, market growth faces a significant obstacle due to a critical shortage of essential raw materials like nitrocellulose, which severely limits production capacity and causes

delays in delivering vital munitions to armed forces.

Market Driver

Rising global defense budgets serve as the primary catalyst for the 30mm ammunition market, with nations prioritizing the restocking of depleted reserves and the maintenance of high-intensity combat readiness. This financial surge targets consumable munitions essential for sustained operations, as evidenced by the Stockholm International Peace Research Institute's April 2024 report showing a 6.8 percent real-term increase in world military expenditure to \$2,443 billion. This spending power results in large-volume contracts, such as Rheinmetall's January 2024 order worth over \$350 million to supply the German Bundeswehr with hundreds of thousands of 30mm x 173 rounds for the Puma infantry fighting vehicle.

The market is also being reshaped by the surging demand for Counter-Unmanned Aerial System (C-UAS) capabilities, necessitating advanced programmable and air-burst munitions to neutralize small, agile drones. Armed forces are transitioning from conventional point-detonating rounds to proximity-fuzed solutions, driving procurement for platforms like the Mobile Short Range Air Defense system. This strategic shift is highlighted by USAspending.gov data from May 2024, noting that Northrop Grumman Systems Corporation received a contract potentially valued at \$264.2 million to produce Lightweight 30mm XM1211 High Explosive Proximity cartridges, validating the move toward high-technology manufacturing.

Market Challenge

A severe structural impediment to the Global Consolidated Region 30mm Ammunition Market is the scarcity of essential raw materials, particularly nitrocellulose, which is the indispensable base for the propellant defining a munition's velocity and effectiveness. When manufacturers are unable to secure sufficient volumes of this compound, production lines for 30mm rounds must halt regardless of the existing order backlog. This shortage extends beyond simple delivery delays; it imposes a strict cap on manufacturing capacity, preventing the industry from fully capitalizing on the intensified demand for modern lethality solutions.

The situation is worsened by a fragile upstream supply network heavily reliant on a concentrated number of chemical precursor providers. The National Defense Industrial Association reported in 2024 that 49 percent of private sector respondents cited single or sole-source suppliers as their primary supply chain vulnerability. This highlights a

critical risk where the inability to source nitrocellulose from diverse alternatives creates a bottleneck that restricts the sector's total output, physically constraining market expansion despite a favorable fiscal environment.

Market Trends

The localization of manufacturing is fundamentally altering supply chain strategies as nations aim to reduce reliance on cross-border logistics and ensure sovereign security of supply. Governments are increasingly mandating onshoring initiatives and establishing local production hubs to maintain inventory levels independent of global shipping bottlenecks, involving the transfer of technical data to domestic industrial bases. A clear example of this trend occurred in July 2024, when Defence Express reported that Northrop Grumman finalized a landmark agreement to produce NATO-standard medium-caliber ammunition, including 30mm rounds, within Ukraine to support immediate operational needs.

Additionally, increased integration with remotely operated weapon stations is elevating the strategic value of 30mm munitions as an optimal balance between lethality and weight. As modern armored fleets transition from manned turrets to unmanned systems, there is growing demand for high-precision medium-caliber rounds that maximize effective range while ensuring crew protection. This trajectory was evidenced in November 2024, when Kongsberg Defence & Aerospace received a \$51 million contract to supply 30mm remote turrets for the U.S. Marine Corps Amphibious Combat Vehicle, confirming the segment's shift toward unmanned firepower.

Key Market Players

BAE Systems Plc

Companhia Brasileira de Cartuchos

Denel SOC Ltd.

Elbit Systems Ltd.

General Dynamics Corporation

KNDS N.V.

MSM Group s.r.o.

Nammo A.S.

Northrop Grumman Corporation

Poongsan Corporation

Report Scope

In this report, the Global Consolidated Region 30mm Ammunition Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Consolidated Region 30mm Ammunition Market, By Caliber

20mm

25mm

30mm

40mm

Other

Consolidated Region 30mm Ammunition Market, By Ammunition Type

High Explosive Incendiary (HEI)

High Explosive Incendiary - Tracer (HEI-T)

High Explosive Incendiary/Tracer - Self Destruct (HEI/T-S.D.)

Semi-Armor Piercing High Explosive Incendiary-Tracer/Self Destruct

Others

Consolidated Region 30mm Ammunition Market, By Platform

Airborne

Naval

Land

Consolidated Region 30mm Ammunition Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Consolidated Region 30mm Ammunition Market.

Available Customizations:

Global Consolidated Region 30mm Ammunition Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL CONSOLIDATED REGION 30MM AMMUNITION MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Caliber (20mm, 25mm, 30mm, 40mm, Other)
 - 5.2.2. By Ammunition Type (High Explosive Incendiary (HEI), High Explosive Incendiary - Tracer (HEI-T), High Explosive Incendiary/Tracer - Self Destruct (HEI/T-S.D.), Semi-Armor Piercing High Explosive Incendiary-Tracer/Self Destruct, Others)

- 5.2.3. By Platform (Airborne, Naval, Land)
- 5.2.4. By Region
- 5.2.5. By Company (2025)
- 5.3. Market Map

6. NORTH AMERICA CONSOLIDATED REGION 30MM AMMUNITION MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Caliber
 - 6.2.2. By Ammunition Type
 - 6.2.3. By Platform
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Consolidated Region 30mm Ammunition Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Caliber
 - 6.3.1.2.2. By Ammunition Type
 - 6.3.1.2.3. By Platform
 - 6.3.2. Canada Consolidated Region 30mm Ammunition Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Caliber
 - 6.3.2.2.2. By Ammunition Type
 - 6.3.2.2.3. By Platform
 - 6.3.3. Mexico Consolidated Region 30mm Ammunition Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Caliber
 - 6.3.3.2.2. By Ammunition Type
 - 6.3.3.2.3. By Platform

7. EUROPE CONSOLIDATED REGION 30MM AMMUNITION MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Caliber
 - 7.2.2. By Ammunition Type
 - 7.2.3. By Platform
 - 7.2.4. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Consolidated Region 30mm Ammunition Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Caliber
 - 7.3.1.2.2. By Ammunition Type
 - 7.3.1.2.3. By Platform
 - 7.3.2. France Consolidated Region 30mm Ammunition Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Caliber
 - 7.3.2.2.2. By Ammunition Type
 - 7.3.2.2.3. By Platform
 - 7.3.3. United Kingdom Consolidated Region 30mm Ammunition Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Caliber
 - 7.3.3.2.2. By Ammunition Type
 - 7.3.3.2.3. By Platform
 - 7.3.4. Italy Consolidated Region 30mm Ammunition Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Caliber
 - 7.3.4.2.2. By Ammunition Type
 - 7.3.4.2.3. By Platform
 - 7.3.5. Spain Consolidated Region 30mm Ammunition Market Outlook
 - 7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Caliber

7.3.5.2.2. By Ammunition Type

7.3.5.2.3. By Platform

8. ASIA PACIFIC CONSOLIDATED REGION 30MM AMMUNITION MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Caliber

8.2.2. By Ammunition Type

8.2.3. By Platform

8.2.4. By Country

8.3. Asia Pacific: Country Analysis

8.3.1. China Consolidated Region 30mm Ammunition Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Caliber

8.3.1.2.2. By Ammunition Type

8.3.1.2.3. By Platform

8.3.2. India Consolidated Region 30mm Ammunition Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Caliber

8.3.2.2.2. By Ammunition Type

8.3.2.2.3. By Platform

8.3.3. Japan Consolidated Region 30mm Ammunition Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Caliber

8.3.3.2.2. By Ammunition Type

8.3.3.2.3. By Platform

8.3.4. South Korea Consolidated Region 30mm Ammunition Market Outlook

- 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
- 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Caliber
 - 8.3.4.2.2. By Ammunition Type
 - 8.3.4.2.3. By Platform
- 8.3.5. Australia Consolidated Region 30mm Ammunition Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Caliber
 - 8.3.5.2.2. By Ammunition Type
 - 8.3.5.2.3. By Platform

9. MIDDLE EAST & AFRICA CONSOLIDATED REGION 30MM AMMUNITION MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Caliber
 - 9.2.2. By Ammunition Type
 - 9.2.3. By Platform
 - 9.2.4. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Consolidated Region 30mm Ammunition Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Caliber
 - 9.3.1.2.2. By Ammunition Type
 - 9.3.1.2.3. By Platform
 - 9.3.2. UAE Consolidated Region 30mm Ammunition Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Caliber
 - 9.3.2.2.2. By Ammunition Type
 - 9.3.2.2.3. By Platform

9.3.3. South Africa Consolidated Region 30mm Ammunition Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Caliber

9.3.3.2.2. By Ammunition Type

9.3.3.2.3. By Platform

10. SOUTH AMERICA CONSOLIDATED REGION 30MM AMMUNITION MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Caliber

10.2.2. By Ammunition Type

10.2.3. By Platform

10.2.4. By Country

10.3. South America: Country Analysis

10.3.1. Brazil Consolidated Region 30mm Ammunition Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Caliber

10.3.1.2.2. By Ammunition Type

10.3.1.2.3. By Platform

10.3.2. Colombia Consolidated Region 30mm Ammunition Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Caliber

10.3.2.2.2. By Ammunition Type

10.3.2.2.3. By Platform

10.3.3. Argentina Consolidated Region 30mm Ammunition Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Caliber

10.3.3.2.2. By Ammunition Type

10.3.3.2.3. By Platform

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Merger & Acquisition (If Any)

12.2. Product Launches (If Any)

12.3. Recent Developments

13. GLOBAL CONSOLIDATED REGION 30MM AMMUNITION MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

14.1. Competition in the Industry

14.2. Potential of New Entrants

14.3. Power of Suppliers

14.4. Power of Customers

14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

15.1. BAE Systems Plc

15.1.1. Business Overview

15.1.2. Products & Services

15.1.3. Recent Developments

15.1.4. Key Personnel

15.1.5. SWOT Analysis

15.2. Companhia Brasileira de Cartuchos

15.3. Denel SOC Ltd.

15.4. Elbit Systems Ltd.

15.5. General Dynamics Corporation

15.6. KNDS N.V.

15.7. MSM Group s.r.o.

15.8. Nammo A.S.

15.9. Northrop Grumman Corporation

15.10. Poongsan Corporation

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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