

# Europe & CIS Large Caliber Ammunition Market By Caliber Type (40 - 60 mm, above 60mm), By End User (Naval Forces, Ground Forces), By Country, By Competition, Opportunities & Forecast, 2020-2030F

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## Abstracts

### Market Overview:

Europe & CIS Large Caliber Ammunition Market was valued at USD 843.96 Million in 2024 and is expected to reach USD 1354.21 Million by 2030 with a CAGR of 8.20% during the forecast period. The Europe & CIS large caliber ammunition market is witnessing steady growth fueled by continuous modernization of military forces, increasing procurement of advanced weaponry systems, and rising demand for artillery and tank ammunition. Defense forces are prioritizing heavy firepower to ensure strategic superiority in modern combat scenarios, thereby driving procurement of 105mm, 120mm, 125mm, and 155mm caliber rounds. Governments are focusing on replacing aging stockpiles with new-generation munitions that offer higher precision, improved range, and enhanced lethality. Integration of smart technologies into large caliber shells, such as guided projectile systems and programmable fuzes, is reshaping the competitive landscape and aligning with next-generation warfare requirements.

Technological advancements in ammunition manufacturing are pushing the boundaries of design, with a focus on weight reduction, environmental sustainability, and interoperability with automated artillery platforms. Innovations such as extended-range artillery rounds and sensor-fused munitions are increasing operational flexibility for armed forces. Growing emphasis on joint training exercises and multinational procurement programs is also accelerating demand for standardized, NATO-compatible large caliber ammunition. Defense industries are forming cross-border partnerships for technology transfer and co-production to strengthen supply chain resilience and reduce

dependency on single-source suppliers. These developments are creating opportunities for both legacy ammunition producers and emerging defense technology firms.

Despite this momentum, the market faces several challenges, including fluctuating raw material prices, regulatory constraints on arms exports, and the complexity of integrating advanced ammunition into legacy platforms. Stringent safety and testing protocols extend development timelines, while rising production costs put pressure on defense budgets. Supply chain disruptions and limited domestic production capacities in some regions hinder timely fulfillment of large-scale orders. Furthermore, competition from alternative firepower technologies, such as drones and precision strike missiles, poses a long-term threat to traditional large caliber systems. Addressing these constraints will be essential to unlocking the full potential of the Europe & CIS large caliber ammunition market.

## Market Drivers

### Defense Modernization Initiatives

Defense modernization efforts are propelling the demand for large caliber ammunition. Armed forces are upgrading artillery systems, tanks, and naval platforms, necessitating compatible and advanced ammunition. This modernization includes the integration of smart technologies into ammunition, enhancing precision and effectiveness on the battlefield. The push for modernization ensures that military capabilities remain robust and responsive to evolving threats. Militaries are shifting focus from sheer volume to performance-oriented munitions, requiring high-quality, precise, and interoperable rounds. Procurement strategies now favor ammunition that can be networked with fire control systems and targeting solutions. Future military doctrine is expected to rely heavily on integrated firepower, where advanced large caliber munitions play a central role. This transformation is strengthening long-term procurement pipelines and encouraging continuous innovation in the industry. For instance, in 2023, global military spending surged to a record-breaking \$2.4 trillion, marking a 3.7% year-on-year increase—the highest annual rise since 2009. According to the Stockholm International Peace Research Institute (SIPRI), this increase reflects growing investments in defense amid geopolitical tensions and widespread insecurity. Europe experienced the sharpest rise in spending, with a 13% growth, driven largely by countries responding to the ongoing war in Ukraine. The United States, maintaining its position as the largest defense spender, accounted for 39% of global expenditure, while China followed with a 13% share.

## Key Market Challenges

### Stringent Regulatory Compliance

The production and distribution of large caliber ammunition are subject to strict regulations. Compliance with international arms control agreements and export controls can be complex and time-consuming. These regulatory frameworks can delay project timelines and increase operational costs for manufacturers, posing a significant challenge in the market. Export licensing restrictions often prevent rapid shipment of large volumes during emergencies. Changes in political regimes or foreign policy can suddenly shift compliance requirements. Vendors must invest heavily in legal counsel and documentation to navigate compliance landscapes. Smaller manufacturers often struggle to meet these obligations, limiting their participation in global tenders.

## Key Market Trends

### Integration of Smart Technologies

The incorporation of smart technologies into large caliber ammunition is a prominent trend. Features like GPS guidance, data links, and programmable fuzes enhance the precision and adaptability of munitions. This trend reflects the broader move towards digitization and network-centric warfare, where real-time data and precision are critical. Smart rounds are also equipped with delay and proximity detonation settings for complex targets. Integration with battlefield management systems is transforming artillery into precision tools. Interoperability with UAVs and ISR platforms is improving strike coordination. The smart munitions segment is seeing fast adoption across both offensive and defensive missions.

## Key Market Players

General Dynamics Corporation

BAE Systems PLC

Rheinmetall AG

Northrop Grumman Corporation

ST Engineering

Saab AB

Denel SOC Ltd

Global Ordnance

Nammo AS

Diehl Stiftung & Co. KG

#### Report Scope:

In this report, the global Europe & CIS Large Caliber Ammunition Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Europe & CIS Large Caliber Ammunition Market, By Caliber Type:

40 - 60 mm

above 60mm

#### Europe & CIS Large Caliber Ammunition Market, By End User:

Naval Forces

Ground Forces

#### Europe & CIS Large Caliber Ammunition Market, By Country:

Germany

Italy

France

United Kingdom

Russia

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the global Europe & CIS Large Caliber Ammunition Market.

### Available Customizations:

Europe & CIS Large Caliber Ammunition Market report with the given market data, TechSci Research offers customizations according to the 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).

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