

# **Man Portable Anti-Armor Weapons Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Anti-Aircraft Missiles, Anti-tank Rifles, Recoilless Rifles and Rocket Propelled Grenades), By Modes (Light Anti-Tank Weapons, Medium Anti-Tank Weapons and Heavy Anti-Tank Weapons), By Technology (Guided Weapons and Unguided Weapons), By Region, Competition, 2019-2029F**

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## **Abstracts**

The Global Man Portable Anti-Armor Weapons Market size reached USD 22.75 Billion in 2023 and is expected to grow with a CAGR of 7.54% in the forecast period 2025-2029. The Global Man-Portable Anti-Armor Weapons Market encompasses a diverse range of portable, shoulder-fired weapons designed to counter armored vehicles and tanks. This market plays a crucial role in modern warfare, providing infantry forces with the capability to engage and neutralize armored threats on the battlefield. The market is characterized by continuous technological advancements aimed at enhancing the performance and versatility of man-portable anti-armor weapons. Innovations include the development of guided missile systems with advanced targeting capabilities, increased range, and improved penetration capabilities. These advancements are driven by the need to address evolving threats and provide infantry units with effective tools to counter a wide range of armored vehicles.

Key players in the defense industry contribute to the market's competitiveness by introducing state-of-the-art man-portable anti-armor systems. These systems often incorporate lightweight materials and advanced propulsion technologies to improve

portability and maneuverability for infantry soldiers. Additionally, the integration of sophisticated electronics, such as infrared guidance systems and fire-and-forget capabilities, enhances the precision and effectiveness of these weapons.

The global market is influenced by geopolitical factors, military modernization initiatives, and the ongoing demand for effective anti-armor capabilities. As nations focus on enhancing their military capabilities, there is a consistent demand for advanced and reliable man-portable anti-armor weapons. The market is responsive to geopolitical tensions and regional security concerns, with countries seeking to equip their forces with cutting-edge anti-armor capabilities to maintain strategic deterrence.

Stringent regulations and export controls influence the global trade of man-portable anti-armor weapons. Governments and defense contractors navigate complex international agreements to ensure compliance with arms control measures while meeting the defense needs of allied nations. The export of these weapons is subject to scrutiny to prevent unauthorized proliferation and ensure responsible arms transfers.

## Key Market Drivers

### Technological Advancements

The Global Man-Portable Anti-Armor Weapons Market is propelled by continuous technological advancements. The development of precision-guided missile systems, advanced targeting capabilities, and improved propulsion technologies enhances the effectiveness and versatility of man-portable anti-armor weapons. These advancements provide infantry forces with more accurate and lethal tools to counter evolving armored threats on the battlefield.

### Military Modernization Initiatives

Military modernization initiatives worldwide drive the demand for advanced man-portable anti-armor weapons. As armed forces seek to enhance their capabilities in response to emerging threats, investments in state-of-the-art anti-armor systems become a priority. Nations recognize the strategic importance of equipping infantry units with powerful and adaptable weapons to maintain a credible deterrent and ensure battlefield superiority.

### Geopolitical Tensions and Regional Conflicts

Geopolitical tensions and regional conflicts significantly influence the Global Man-Portable Anti-Armor Weapons Market. Ongoing security concerns and the potential for armored threats in various regions drive the procurement of anti-armor weapons. Nations facing specific geopolitical challenges prioritize the acquisition of advanced man-portable systems to address regional security dynamics and maintain a robust defense posture.

### Enhanced Portability and Maneuverability

The market is driven by efforts to enhance the portability and maneuverability of man-portable anti-armor weapons. Innovations in lightweight materials and propulsion technologies contribute to the development of more compact and mobile systems. Improved portability ensures that infantry soldiers can effectively carry and deploy these weapons in diverse operational environments, increasing their overall tactical flexibility.

### Integration of Electronics and Guidance Systems

Electronics play a crucial role in the market's growth, with the integration of advanced guidance systems. Infrared guidance, fire-and-forget capabilities, and other electronic enhancements improve the precision and autonomy of man-portable anti-armor weapons. These features enable soldiers to engage armored targets with greater accuracy, reducing the risk to friendly forces and enhancing overall mission success.

### Strategic Alliances and Collaborations

Strategic alliances and collaborations between defense contractors and military organizations drive innovation and market expansion. Joint development projects and international partnerships enable the pooling of resources and expertise to create cutting-edge anti-armor systems. Collaborative efforts contribute to the globalization of the market and facilitate the sharing of advanced technologies among allied nations.

### Increased Defense Budgets

Rising defense budgets across various nations contribute to the growth of the Global Man-Portable Anti-Armor Weapons Market. The allocation of increased funding for defense allows governments to invest in acquiring the latest anti-armor capabilities. Nations prioritize the procurement of advanced weapons to ensure the readiness of their armed forces and address evolving threats posed by armored vehicles.

## Counterterrorism Operations

The focus on counterterrorism operations further drives the demand for man-portable anti-armor weapons. As counterinsurgency and counterterrorism efforts continue globally, infantry forces require effective tools to neutralize the threat posed by armored vehicles employed by non-state actors. The market responds by providing specialized anti-armor systems designed for urban and asymmetric warfare scenarios.

## Key Market Challenges

### Armor Advancements and Countermeasures

A significant challenge faced by the Global Man-Portable Anti-Armor Weapons Market is the continuous evolution of armored vehicle technologies and the development of effective countermeasures. As armored threats incorporate advanced materials and defensive systems, the challenge lies in developing anti-armor weapons capable of overcoming these defenses, ensuring the sustained effectiveness of infantry forces on the battlefield.

### Cost and Affordability Constraints

The development and procurement of advanced man-portable anti-armor weapons often involve high research, development, and production costs. Budget constraints and affordability issues pose challenges for both manufacturers and military entities, limiting the widespread adoption of cutting-edge technologies. Striking a balance between technological sophistication and cost-effectiveness becomes crucial in addressing this challenge.

### Weight and Portability Trade-offs

Achieving the optimal balance between weight and portability is a persistent challenge in the market. As the demand for more powerful and versatile anti-armor weapons increases, there is a constant struggle to enhance capabilities without compromising the portability that is essential for infantry soldiers. Managing the weight of advanced systems while ensuring maneuverability remains a technical and logistical challenge.

### International Export Controls

The Global Man-Portable Anti-Armor Weapons Market is subject to stringent

international export controls and regulations. Governments must navigate complex legal frameworks to facilitate responsible arms transfers while preventing the unauthorized proliferation of advanced weaponry. Export control challenges impact the global trade of these weapons, requiring careful consideration of political, diplomatic, and security factors.

### Operational Range and Lethality

Enhancing the operational range and lethality of man-portable anti-armor weapons poses a technical challenge. The need for increased range to engage targets from a safe distance and improved lethality against modern armored threats necessitates ongoing research and development efforts. Balancing these requirements without sacrificing other crucial factors, such as portability, remains a complex challenge.

### Human Factors and Training

The effective use of man-portable anti-armor weapons requires well-trained infantry soldiers. Adequate training programs and considerations for human factors, including ergonomics and user interfaces, are essential. The challenge lies in ensuring that soldiers can efficiently operate and maintain these advanced systems, especially in high-pressure combat situations, requiring continuous investment in training infrastructure and resources.

### Proliferation Risks and Non-State Actors

The risk of man-portable anti-armor weapons falling into the hands of non-state actors poses a significant challenge. The portability and potential lethality of these weapons make them attractive targets for illicit arms trade. Mitigating proliferation risks requires robust international cooperation, intelligence-sharing, and measures to secure and monitor weapon stockpiles globally.

### Adaptability to Asymmetric Warfare

The rise of asymmetric warfare scenarios, characterized by unconventional tactics and varying operational environments, poses a challenge for man-portable anti-armor weapons. Designing systems that can adapt to the dynamic nature of asymmetric threats, such as urban warfare or irregular combat situations, requires constant innovation and flexibility in weapon design and deployment strategies.

## Key Market Trends

### Integration of Smart Technologies

A prominent trend in the Global Man-Portable Anti-Armor Weapons Market is the integration of smart technologies to enhance targeting and operational capabilities. This includes the incorporation of advanced guidance systems, artificial intelligence, and sensor technologies, enabling precision strikes on armored targets. The trend aligns with the broader shift towards network-centric warfare and increased reliance on data-driven decision-making in modern conflict scenarios.

### Development of Lightweight and Portable Systems

The market is witnessing a trend towards the development of lightweight and highly portable man-portable anti-armor weapons. Innovations in materials, such as composite alloys and carbon fiber, contribute to reduced weapon weight without compromising lethality. Enhanced portability is crucial for infantry forces operating in diverse environments, allowing for greater mobility and flexibility on the battlefield.

### Advancements in Seeker Technologies

Seeker technologies, including infrared and laser guidance systems, are experiencing advancements, contributing to improved target acquisition and tracking capabilities. These technologies enhance the accuracy of anti-armor weapons, particularly in challenging environments or against fast-moving targets. The trend underscores the market's focus on increasing the lethality and reliability of man-portable systems.

### Modularity and Multi-Mission Capabilities

A trend towards modular designs and multi-mission capabilities is observed in the development of man-portable anti-armor weapons. Systems designed to accommodate different types of warheads or payloads cater to a range of operational scenarios. This trend allows military forces to adapt quickly to evolving threats and operational requirements, increasing the versatility of anti-armor weaponry.

### Electro-Optical and Infrared (EO/IR) Technologies

Electro-optical and infrared technologies are playing a crucial role in enhancing the situational awareness of anti-armor weapon operators. EO/IR sensors provide



increased visibility in low-light conditions and adverse weather, improving the effectiveness of these weapons in various environments. The trend towards advanced EO/IR technologies reflects a commitment to optimizing performance across diverse operational scenarios.

### Increasing Emphasis on Non-Line-of-Sight (NLOS) Capabilities

The market is witnessing an increasing emphasis on Non-Line-of-Sight (NLOS) capabilities, allowing anti-armor weapons to engage targets beyond the operator's direct line of sight. This trend aligns with the need for improved standoff distances and enhanced survivability for infantry forces. NLOS capabilities contribute to increased operational flexibility and the ability to engage threats from concealed positions.

### Global Collaboration and Joint Development

Collaborative efforts and joint development projects among global defense contractors and military organizations are shaping the market's trends. International partnerships facilitate the sharing of technological expertise and resources, leading to the creation of advanced anti-armor systems. This trend reflects a globalized approach to addressing evolving threats and ensuring interoperability among allied nations.

### Electromagnetic (EM) and Radio Frequency (RF) Countermeasures

A notable trend involves the integration of electromagnetic and radio frequency countermeasures in man-portable anti-armor weapons to enhance survivability on the battlefield. These countermeasures aim to disrupt or evade enemy electronic systems and guided munitions, reducing the effectiveness of potential threats. The trend reflects a proactive approach to addressing the electronic warfare challenges associated with modern armored vehicles.

### Segmental Insights

#### By Type

The Anti-Aircraft Missiles segment within the Global Man-Portable Anti-Armor Weapons Market represents a critical category designed to counter airborne threats. These missiles are equipped with advanced guidance systems, seeking out and intercepting aircraft, helicopters, and unmanned aerial vehicles (UAVs). The trend within this segment includes the integration of cutting-edge sensor technologies and improved

agility to effectively engage fast-moving aerial targets. Anti-Aircraft Missiles are increasingly adaptable, addressing the evolving landscape of aerial threats on the modern battlefield.

The Anti-tank Rifles segment plays a pivotal role in the market, providing infantry forces with powerful rifles specifically designed to penetrate the armor of tanks and other armored vehicles. These rifles are characterized by their high-caliber ammunition and precision targeting capabilities. Recent trends in this segment include the development of lightweight and portable anti-tank rifles, offering improved maneuverability for infantry soldiers. Advancements in materials and design contribute to the overall effectiveness of Anti-tank Rifles in countering armored threats.

Recoilless Rifles represent a versatile segment in the Global Man-Portable Anti-Armor Weapons Market, known for their adaptability to various operational scenarios. These weapons use a recoilless design to minimize the backward force upon firing, allowing for effective use by infantry. Recoilless Rifles are suitable for engaging both armored vehicles and fortified positions. A notable trend in this segment involves efforts to enhance the portability and recoil management of these rifles, making them more user-friendly and responsive to the needs of modern infantry forces.

The Rocket Propelled Grenades (RPGs) segment remains a widely used and evolving category within the market. RPGs are portable, shoulder-fired devices that launch rockets equipped with anti-armor warheads. Recent trends focus on the development of advanced RPG systems with improved accuracy, longer ranges, and enhanced warhead technologies. Additionally, efforts are underway to address challenges related to the weight of RPG systems, making them more maneuverable for infantry soldiers. RPGs continue to be a critical component in the anti-armor arsenal due to their simplicity, cost-effectiveness, and versatility on the battlefield.

## Regional Insights

North America, the market for man-portable anti-armor weapons is characterized by robust research and development activities and a strong emphasis on technological innovation. The region hosts key defense contractors and military establishments contributing to the continuous advancement of anti-armor systems. With a focus on military modernization and addressing evolving threats, North America remains a leading market player. Additionally, the influence of stringent safety regulations and the integration of cutting-edge electronic systems in anti-armor weapons contribute to the region's prominence in shaping the market.



Europe stands as a significant hub for the development and procurement of man-portable anti-armor weapons. The region benefits from collaborative efforts among European Union member states and the oversight of the European Defence Agency. European nations prioritize the enhancement of infantry capabilities, resulting in the adoption of advanced anti-armor systems. The market in Europe is influenced by a mix of established defense manufacturers and innovative startups, fostering a competitive landscape. The European market reflects a commitment to meeting the challenges posed by contemporary armored threats through collaborative research and development initiatives.

The Asia-Pacific region is witnessing substantial growth in the man-portable anti-armor weapons market, driven by increased defense budgets, military modernization initiatives, and rising geopolitical tensions. Countries such as China and India are investing in advanced anti-armor capabilities to strengthen their defense capabilities. The region's market dynamics are shaped by a mix of domestic production, international collaborations, and the adoption of cutting-edge technologies. As Asia-Pacific nations seek to address regional security challenges, the demand for versatile and technologically advanced anti-armor systems continues to rise.

The Middle East and Africa and South America exhibit a growing demand for man-portable anti-armor weapons due to regional security concerns and ongoing conflicts. Nations in these regions particularly those investing heavily in defense, are keen on acquiring advanced anti-armor capabilities to counter diverse threats. The market dynamics are influenced by the unique operational requirements of the Middle East, including desert environments and the prevalence of asymmetric warfare. Collaboration with global defense contractors and a focus on addressing specific regional challenges contribute to shaping the market

### Key Market Players

Daycraft Weapon Systems, LLC

Bharat Dynamics Limited

China Ordnance Industries Group Corporation Limited

LIG Nex1 Co. Ltd

Lockheed Martin Corporation

MBDA Inc.

Nammo AS

Report Scope:

In this report, the Global Man Portable Anti-Armor Weapons Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Man Portable Anti-Armor Weapons Market, By Type:

- oAnti-Aircraft Missiles

- oAnti-tank Rifles

- oRecoilless Rifles

- oRocket Propelled Grenades

Man Portable Anti-Armor Weapons Market,By Modes:

- oLight Anti-Tank Weapons

- oMedium Anti-Tank Weapons

- oHeavy Anti-Tank Weapons

Man Portable Anti-Armor Weapons Market,By Technology:

- oGuided Weapons

- oUnguided Weapons

Man Portable Anti-Armor Weapons Market, By Region:

- oNorth America

United States

Canada

Mexico

oEurope CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

oAsia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

## oSouth America

Brazil

Argentina

Colombia

## oMiddle East Africa

Turkey

Iran

Saudi Arabia

UAE

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Man Portable Anti-Armor Weapons Market.

### Available Customizations:

Global Man Portable Anti-Armor Weapons 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).

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