

Middle East & Africa Large Caliber Ammunition Market Segmented, By Caliber Type (40 - 60 mm, above 60mm), By End User (Naval Forces, Ground Forces), By Country, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Middle East & Africa Large Caliber Ammunition Market was valued at USD 22.39 million in 2024 and is anticipated to grow USD 27.61 million by 2030 with a CAGR of 3.61% during forecast period. The Middle East & Africa large caliber ammunition market is experiencing growth due to increasing defense budgets, military modernization, and security challenges in the region. Countries like Saudi Arabia, the UAE, and Israel are investing in advanced ammunition systems, including precision-guided munitions, to enhance operational capabilities. Additionally, the trend towards local defense manufacturing is gaining momentum, with nations striving to reduce dependence on foreign suppliers. As a result, the market is expanding with a focus on improving defense preparedness and technological innovation.

Key Market Drivers

Increased Defense Spending and Modernization Programs

The Middle East & Africa region has seen a significant rise in defense spending, driven by escalating geopolitical tensions, regional conflicts, and the need to strengthen national security. Countries like Saudi Arabia, the UAE, and Israel are among the top global defense spenders, while nations in Africa such as Egypt and South Africa have prioritized military modernization. This increased investment fuels demand for advanced large caliber ammunition, particularly for artillery systems, tanks, and naval platforms. Governments are also focusing on acquiring cutting-edge military technology, including

precision-guided and extended-range ammunition, to enhance their defense capabilities. According to the study, military expenditure in the Middle East rose by 9.0 percent to reach USD200 billion in 2023, marking the highest annual growth rate in the region over the past decade. This increase in defense spending is a key driver of market growth.

Modernization programs across the region are incorporating state-of-the-art weaponry, including self-propelled artillery systems and upgraded battle tanks that require large caliber ammunition. For example, Saudi Arabia has invested in advanced artillery platforms, while African nations are modernizing their fleets with upgraded armored vehicles, fueling consistent demand for various types of large caliber ammunition.

Geopolitical Tensions and Regional Conflicts

The Middle East is a region historically impacted by conflicts, territorial disputes, and political unrest, which continues to drive demand for military supplies, including large caliber ammunition. Ongoing tensions between nations such as Iran and Saudi Arabia, the conflict in Yemen, and disputes involving Israel have kept the demand for artillery and tank ammunition high. Similarly, African countries facing insurgencies, terrorism, and border disputes are increasing their defense preparedness, further boosting the need for large caliber ammunition.

Defense forces require a steady supply of large caliber ammunition for training, operations, and maintaining readiness, especially in regions where conflicts persist. Additionally, governments in the region are strengthening their militaries to deter threats and ensure national sovereignty. This constant state of preparedness is a key driver for the market, as countries seek reliable and high-performance ammunition to address their security challenges.

Rising Local Manufacturing and International Collaborations

The region is witnessing increased efforts to localize production of military equipment, including large caliber ammunition. Governments are encouraging domestic manufacturing to reduce reliance on imports, improve supply chain resilience, and support economic growth. For instance, Saudi Arabia has committed to manufacturing 50% of its defense equipment domestically by 2030 under the Vision 2030 initiative. Local players are forming joint ventures and partnerships with international defense companies to establish advanced manufacturing facilities for large caliber ammunition.

In Africa, countries like South Africa are leveraging their established defense industries to produce ammunition locally and export to neighboring nations. International collaborations are also playing a crucial role, with global defense giants providing technological expertise and support to enhance production capabilities in the region. These developments not only meet regional demand but also position local manufacturers as key players in the global defense supply chain.

Key Market Challenges

Stringent Export Regulations and Supply Chain Challenges

The production and trade of large caliber ammunition are heavily regulated due to concerns over proliferation, misuse, and international security. Countries in the Middle East and Africa often face difficulties in procuring ammunition due to complex export regulations imposed by leading arms-exporting nations. These regulations, which are designed to prevent the unauthorized use of military equipment, can result in delays, increased costs, or outright denials of export licenses.

In addition, supply chain challenges exacerbate the problem. Many countries in the region rely on imports for large caliber ammunition, and logistical issues such as transportation bottlenecks, inadequate infrastructure, and political instability can disrupt the supply chain. For instance, conflict zones often face difficulty accessing critical supplies due to restricted routes or embargoes. These challenges make it harder for countries to maintain consistent ammunition stockpiles, affecting military preparedness and operational effectiveness.

Technological Gaps and Dependence on Imports

Despite efforts to localize production, many countries in the Middle East & Africa lack the advanced technological capabilities required for manufacturing sophisticated large caliber ammunition. While countries like Saudi Arabia and South Africa are making progress in building domestic defense industries, others remain heavily reliant on foreign suppliers for both finished ammunition and the technological expertise needed for production.

This dependence on imports exposes countries to vulnerabilities such as price fluctuations, geopolitical pressures, and trade restrictions. Furthermore, local manufacturers in the region often struggle to compete with established global players due to limited access to advanced manufacturing technologies and expertise. This

technological gap not only affects the quality and competitiveness of locally produced ammunition but also hinders innovation and the development of region-specific solutions.

Key Market Trends

Shift Toward Precision-Guided Ammunition

One of the most prominent trends in the Middle East & Africa large caliber ammunition market is the increasing adoption of precision-guided munitions (PGMs). Countries in the region are shifting from traditional unguided artillery shells to advanced, GPS-guided ammunition systems that offer greater accuracy and efficiency. This trend is driven by the need to minimize collateral damage, improve operational effectiveness, and address the evolving nature of modern warfare.

Precision-guided large caliber ammunition, such as the Excalibur artillery shells and similar advanced systems, is particularly attractive to Middle Eastern nations involved in conflicts or facing asymmetric threats. The accuracy of these systems allows militaries to achieve tactical objectives with fewer rounds, reducing both logistical burdens and operational costs. As a result, defense forces in the region are investing heavily in PGMs to enhance their strike capabilities. The trend is further supported by collaborations with global manufacturers who are providing the necessary technology and expertise to integrate precision-guided systems into existing platforms.

Rise of Local Manufacturing and Defense Industries

Governments across the Middle East and Africa are increasingly prioritizing the development of local defense industries to reduce dependence on imports, improve self-reliance, and stimulate economic growth. In the Middle East, countries such as Saudi Arabia and the UAE are spearheading efforts to localize the production of large caliber ammunition. For instance, Saudi Arabia's Vision 2030 initiative emphasizes domestic manufacturing of defense equipment, with the goal of producing 50% of military systems locally by the end of the decade.

In Africa, countries like South Africa have established themselves as key players in the defense sector, with a focus on producing and exporting large caliber ammunition to neighboring countries. The rise of local manufacturing is supported by joint ventures and technology transfer agreements between domestic players and international defense firms. These collaborations not only enhance regional production capabilities

but also contribute to the growth of the local workforce and supply chain networks. This trend is expected to continue as nations seek to strengthen their defense industries and reduce external dependencies.

Increased Focus on Multi-Domain Operations

The growing complexity of modern conflicts in the Middle East & Africa has driven demand for large caliber ammunition designed for multi-domain operations, encompassing land, air, and naval platforms. Militaries in the region are adopting versatile ammunition systems that can be deployed across various platforms, including self-propelled artillery, naval guns, and armored vehicles.

For example, naval forces in the Middle East are increasingly investing in large caliber ammunition for coastal defense and strategic deterrence, while land forces require extended-range artillery systems to counter threats in expansive terrains. Similarly, African nations are seeking multipurpose ammunition systems that can address diverse security challenges, including counterinsurgency, border security, and peacekeeping missions. This focus on multi-domain operations has prompted manufacturers to develop ammunition systems that offer enhanced compatibility, flexibility, and performance across different operational scenarios.

Segmental Insights

End User Insights

Naval forces dominated the Middle East & Africa large caliber ammunition market due to their critical role in securing maritime borders, safeguarding trade routes, and countering regional threats. With countries like Saudi Arabia and the UAE heavily investing in naval modernization, the demand for large caliber ammunition for naval guns has surged. Coastal defense and the protection of key waterways, such as the Strait of Hormuz, further drive this segment's prominence. Additionally, advancements in naval artillery technology, including extended-range and precision-guided ammunition, enhance operational efficiency, making naval forces a dominant segment in the region's large caliber ammunition market.

Country Insights

Saudi Arabia dominated the Middle East & Africa large caliber ammunition market due to its substantial defense spending, modernized military infrastructure, and strategic

initiatives to localize production. As one of the world's top defense importers, Saudi Arabia invests heavily in advanced artillery systems and large caliber ammunition to enhance its military capabilities. The nation's Vision 2030 program aims to localize 50% of defense manufacturing, driving growth in domestic production and fostering partnerships with global manufacturers. Additionally, its involvement in regional conflicts and the need for robust security measures to safeguard strategic interests further reinforce Saudi Arabia's leadership in the market.

Key Market Players

General Dynamics Corporation

Kongsberg Gruppen ASA

Singapore Technologies Engineering Ltd

BAE Systems plc

Rheinmetall AG

Northrop Grumman Corporation

Saab AB

Denel SOC Ltd

Nammo AS

Diehl Stiftung & Co. KG

Report Scope:

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

Middle East & Africa Large Caliber Ammunition Market, By Caliber Type:

40 - 60 mm

Above 60mm

Middle East & Africa Large Caliber Ammunition Market, By End User:

Naval Forces

Ground Forces

Middle East & Africa Large Caliber Ammunition Market, By Country:

Saudi Arabia

UAE

Egypt

Qatar

Oman

South Africa

Turkey

Nigeria

Rest of Middle East & Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Middle East & Africa Large Caliber Ammunition Market.

Available Customizations:

Middle East & Africa Large Caliber Ammunition Market report with the given market

Middle East & Africa Large Caliber Ammunition Market Segmented, By Caliber Type (40 - 60 mm, above 60mm), By E...

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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