

# **Military Computers Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Rugged Computers, Embedded Computers), By Application (Air, Naval, Ground), By Region & Competition, 2021-2031F**

<https://marketpublishers.com/r/MCE6D9BB1160EN.html>

Date: January 2026

Pages: 185

Price: US\$ 4,500.00 (Single User License)

ID: MCE6D9BB1160EN

## **Abstracts**

The Global Military Computers Market is projected to expand from USD 7.25 Billion in 2025 to USD 10.44 Billion by 2031, reflecting a compound annual growth rate of 6.27%. These military computers are specialized, ruggedized processing systems designed to withstand harsh environmental conditions, such as extreme temperatures and vibration, while meeting rigorous defense standards. The market is primarily driven by rising geopolitical tensions and the global necessity to modernize command and control infrastructures. This demand is further intensified by the transition toward networked warfare, which necessitates robust computing power to manage complex data for strategic decision-making.

Significant financial investment in the defense sector underpins the procurement of these advanced technologies. Data from the Stockholm International Peace Research Institute indicates that in 2024, global military expenditure rose by 9.4 percent to a record USD 2.7 trillion. However, despite this strong fiscal support, the market faces a substantial hurdle regarding semiconductor supply chain instability. This specific challenge results in production bottlenecks and delays, which can critically hinder the timely deployment of vital computing assets to armed forces.

## **Market Driver**

The expansion of the military computers market is fundamentally fueled by rising global defense expenditures and comprehensive modernization initiatives. Nations are

prioritizing the substitution of legacy hardware with ruggedized systems designed to manage the data-intensive requirements of modern warfare doctrines, ensuring the steady procurement of servers, wearable devices, and embedded systems for C4ISR operations. According to the North Atlantic Treaty Organization's June 2024 report on defense expenditure, spending by European Allies and Canada is projected to increase by 17.9 percent in real terms in 2024 compared to the previous year, enabling heavy investment in upgrading technological infrastructure and directly benefiting the supply chain for military-grade processing units.

Concurrently, the integration of artificial intelligence and machine learning is accelerating the demand for high-performance computing platforms within the defense sector. Autonomous systems and intelligent decision-making tools necessitate advanced processing capabilities to analyze sensor data in real-time at the tactical edge, thereby minimizing latency and reliance on cloud connectivity. Highlighting this shift, the U.S. Department of Defense's March 2024 budget request allocates 1.8 billion dollars specifically for delivering AI-enabled capabilities, driving hardware procurement toward systems with improved GPU integration and thermal management. Further evidencing this capital commitment, Defense News reported in 2024 that the U.S. Army awarded a 178.4 million dollar agreement to develop next-generation tactical ground station systems.

## **Market Challenge**

Semiconductor supply chain instability constitutes a critical bottleneck that impedes the growth of the Global Military Computers Market. Because these specialized systems utilize advanced, ruggedized components that must survive rigorous testing to satisfy strict defense standards, they are particularly vulnerable to disruptions within the global chip ecosystem. When the availability of these essential microelectronics tightens or fluctuates, manufacturers encounter substantial challenges in acquiring the specific processors and logic chips required for production, leading to unpredictability in manufacturing schedules, extended lead times for defense contractors, and delays in delivering mission-critical hardware.

This disruption directly obstructs market growth by stalling the fulfillment of procurement contracts, even amidst robust financial backing. In March 2025, the Association Connecting Electronics Industries (IPC) reported that the material costs index for the global electronics manufacturing supply chain climbed to 127, signaling renewed input cost pressures and supply constraints. Such volatility not only escalates production costs but also restricts the industry's capacity to translate rising global demand into

delivered units, thereby constraining overall market revenue and retarding the modernization of command and control infrastructures.

## **Market Trends**

The market is being fundamentally reshaped by the adoption of Modular Open Systems Approach (MOSA) standards, which prioritize interoperability and rapid technology insertion over proprietary legacy architectures. Defense agencies are increasingly mandating these open standards to mitigate vendor lock-in and accelerate the deployment of upgraded processing capabilities across both airborne and ground platforms, enabling the seamless integration of third-party modules to lower lifecycle costs and shorten development timelines. This industry-wide transition is exemplified by RTX's March 2025 announcement, wherein Collins Aerospace secured an 80 million dollar contract to upgrade U.S. Army Black Hawk helicopters with the MOSA-compliant Mosarc avionics solution.

Concurrently, the proliferation of soldier-worn tactical computing devices is expanding the market as armed forces aim to digitize the dismounted warfighter for improved situational awareness. Modern infantry operations rely increasingly on wearable heads-up displays and ruggedized processing units that fuse sensor data, navigation, and thermal imagery in real-time at the tactical edge, transforming individual soldiers into connected nodes within the broader combat network. Highlighting this procurement priority, a June 2025 report by the Congressional Research Service noted that the U.S. Army requested 255 million dollars in Fiscal Year 2025 specifically to procure 3,162 units of the IVAS 1.2 system.

## **Key Market Players**

BAE Systems plc

Cobham Limited

Curtiss-Wright Corporation

Thales SA

L3Harris Technologies, Inc

RTX Corporation

Saab AB

Teledyne Technologies Incorporated

Getac Technology Corporation

Northrop Grumman Corporation

## Report Scope

In this report, the Global Military Computers Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Military Computers Market, By Type

Rugged Computers

Embedded Computers

Military Computers Market, By Application

Air

Naval

Ground

Military Computers 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 Military Computers Market.

**Available Customizations:**

Global Military Computers 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 MILITARY COMPUTERS MARKET OUTLOOK**

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Type (Rugged Computers, Embedded Computers)
  - 5.2.2. By Application (Air, Naval, Ground)
  - 5.2.3. By Region
  - 5.2.4. By Company (2025)

### 5.3. Market Map

## 6. NORTH AMERICA MILITARY COMPUTERS MARKET OUTLOOK

### 6.1. Market Size & Forecast

#### 6.1.1. By Value

### 6.2. Market Share & Forecast

#### 6.2.1. By Type

#### 6.2.2. By Application

#### 6.2.3. By Country

### 6.3. North America: Country Analysis

#### 6.3.1. United States Military Computers 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 Type

###### 6.3.1.2.2. By Application

#### 6.3.2. Canada Military Computers 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 Type

###### 6.3.2.2.2. By Application

#### 6.3.3. Mexico Military Computers 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 Type

###### 6.3.3.2.2. By Application

## 7. EUROPE MILITARY COMPUTERS MARKET OUTLOOK

### 7.1. Market Size & Forecast

#### 7.1.1. By Value

### 7.2. Market Share & Forecast

#### 7.2.1. By Type

#### 7.2.2. By Application

#### 7.2.3. By Country

### 7.3. Europe: Country Analysis

- 7.3.1. Germany Military Computers 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 Type
    - 7.3.1.2.2. By Application
- 7.3.2. France Military Computers 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 Type
    - 7.3.2.2.2. By Application
- 7.3.3. United Kingdom Military Computers 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 Type
    - 7.3.3.2.2. By Application
- 7.3.4. Italy Military Computers 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 Type
    - 7.3.4.2.2. By Application
- 7.3.5. Spain Military Computers 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 Type
    - 7.3.5.2.2. By Application

## **8. ASIA PACIFIC MILITARY COMPUTERS MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value
- 8.2. Market Share & Forecast
  - 8.2.1. By Type
  - 8.2.2. By Application
  - 8.2.3. By Country

- 8.3. Asia Pacific: Country Analysis
  - 8.3.1. China Military Computers 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 Type
      - 8.3.1.2.2. By Application
  - 8.3.2. India Military Computers 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 Type
      - 8.3.2.2.2. By Application
  - 8.3.3. Japan Military Computers 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 Type
      - 8.3.3.2.2. By Application
  - 8.3.4. South Korea Military Computers 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 Type
      - 8.3.4.2.2. By Application
  - 8.3.5. Australia Military Computers 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 Type
      - 8.3.5.2.2. By Application

## **9. MIDDLE EAST & AFRICA MILITARY COMPUTERS MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Type
  - 9.2.2. By Application

- 9.2.3. By Country
- 9.3. Middle East & Africa: Country Analysis
  - 9.3.1. Saudi Arabia Military Computers 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 Type
      - 9.3.1.2.2. By Application
  - 9.3.2. UAE Military Computers 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 Type
      - 9.3.2.2.2. By Application
  - 9.3.3. South Africa Military Computers 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 Type
      - 9.3.3.2.2. By Application

## **10. SOUTH AMERICA MILITARY COMPUTERS MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Type
  - 10.2.2. By Application
  - 10.2.3. By Country
- 10.3. South America: Country Analysis
  - 10.3.1. Brazil Military Computers 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 Type
      - 10.3.1.2.2. By Application
  - 10.3.2. Colombia Military Computers 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 Type

##### 10.3.2.2.2. By Application

#### 10.3.3. Argentina Military Computers 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 Type

##### 10.3.3.2.2. By Application

## 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 MILITARY COMPUTERS 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. Cobham Limited
- 15.3. Curtiss-Wright Corporation
- 15.4. Thales SA
- 15.5. L3Harris Technologies, Inc
- 15.6. RTX Corporation
- 15.7. Saab AB
- 15.8. Teledyne Technologies Incorporated
- 15.9. Getac Technology Corporation
- 15.10. Northrop Grumman Corporation

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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