

Naval Gun System Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Platform Type (Large Ship, Medium Ship, Small Ships), By Weapon Type (Rail Gun, Laser Gun), By Caliber Size (200mm), By Region, Competition, 2019-2029

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Abstracts

Global Naval Gun System Market was valued at USD 7.93 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 5.86% through 2029. Since the start of World War II, the naval industry has been dominated by the usage of naval guns, which have been used more frequently. Naval guns are employed for a variety of tasks, including littoral warfare, surface warfare, anti-air warfare, warning shots, and anti-piracy. Because of its increased cost due to advancements in technology, missile technology is becoming less and less used. Because of their low cost and abundance of rounds, guns are being favored over missiles. Furthermore, gun shells cannot be shot down by missiles, and electronic jamming and decoys are useless against guns. They are also capable of engaging targets very near to the ship. Rising cross-border threats, rising average defense budgets, and rising naval gun acquisitions are the reasons driving the growth of the naval gun system market. Lower operating and capital expenses are the outcome of the naval gun system market's substantial technological advancement.

Key Market Drivers

Geopolitical Tensions and Maritime Security Concerns

Geopolitical tensions and concerns over maritime security play a significant role in

driving the global naval gun system market. In an increasingly interconnected and globalized world, the importance of securing maritime trade routes, protecting territorial waters, and safeguarding national interests at sea has never been greater. Geopolitical disputes, territorial conflicts, and the need to counter piracy and terrorism have heightened the demand for naval gun systems. Maritime security is vital for the global economy. Most of the global trade is transported by sea, making secure and open shipping lanes a necessity. Disruptions caused by piracy, smuggling, or territorial disputes can have far-reaching economic consequences. As a result, nations with significant coastlines or maritime interests invest in naval forces and gun systems to ensure the safety of their waters and secure their economic interests. The heightened concerns over maritime security have led to increased investments in naval capabilities, including the acquisition of modern naval gun systems. These systems are essential for patrolling and defending a nation's maritime borders, protecting its territorial waters, and ensuring the free flow of trade. As such, the demand for naval gun systems has grown in response to these geopolitical challenges.

Modernization and Upgradation of Naval Fleets

The modernization and upgradation of existing naval fleets represents another significant driver for the global naval gun system market. Many nations maintain aging fleets that require revitalization to remain operationally effective. Modernizing these fleets often includes upgrading or replacing their naval gun systems with more advanced and capable options. Naval fleets worldwide comprise a mix of old and new vessels. Older vessels, while still operational, may not have the latest technology or capabilities to meet current threats effectively. As new technologies, threats, and operational requirements emerge, the need to modernize and upgrade these vessels becomes apparent. Naval gun systems are a critical component of this modernization process. The drive to modernize naval fleets results in a demand for advanced naval gun systems that offer improved range, accuracy, and lethality. Defense contractors play a pivotal role in meeting this demand by developing and supplying modern naval gun systems that can be integrated seamlessly with upgraded platforms. Consequently, the market benefits from the ongoing modernization efforts of naval forces around the world.

Growing Threats from Asymmetric Warfare and Terrorism

The evolving nature of threats in modern warfare, particularly from asymmetric and unconventional actors, has spurred the demand for naval gun systems. Such threats include swarming small boat attacks, armed unmanned aerial and underwater systems,

and the potential use of commercial shipping vessels as platforms for attacks. These non-traditional threats necessitate the development and deployment of naval gun systems capable of countering them effectively. Asymmetric threats challenge traditional naval forces in unique ways. They are often difficult to detect and engage using conventional means, making them a serious concern for naval security. Small, agile vessels, armed drones, and other unconventional tactics pose significant challenges to naval assets, including larger vessels and military bases. To address these asymmetric threats, naval forces require specialized naval gun systems with enhanced precision, rapid firing capabilities, and the ability to engage multiple targets simultaneously. Defense contractors have responded by developing technologically advanced naval gun systems capable of countering these threats effectively. This has driven demand for innovative solutions, boosting the naval gun system market.

Emphasis on Multimission Capabilities

Modern naval forces increasingly emphasize the importance of multimission capabilities for their platforms, which includes the ability to conduct a wide range of tasks efficiently. Naval gun systems play a crucial role in achieving these multimission objectives by providing versatile, multirole firepower. Naval platforms are expected to perform a diverse set of missions, ranging from anti-air warfare and anti-surface warfare to naval fire support and anti-submarine warfare. To fulfill these requirements, naval gun systems need to be adaptable, offering different types of ammunition, guidance systems, and rapid targeting capabilities. This emphasis on multimission capabilities has driven the development of advanced naval gun systems that can engage a variety of targets with precision and effectiveness. These systems can be used in diverse scenarios, reducing the need for separate weapons systems for each specific mission. As naval forces prioritize versatile firepower, the naval gun system market benefits from the demand for these adaptable, multirole solutions.

Technological Advancements and Innovation

Technological advancements and innovation represent a fundamental driver of the global naval gun system market. The defense industry is continuously evolving, with ongoing developments in materials, guidance systems, automation, and other critical technologies that significantly enhance the capabilities of naval gun systems. Technological advancements have led to substantial improvements in naval gun systems' accuracy, range, and rate of fire. These systems can now engage a wider range of threats, including fast-moving, low-profile targets such as small boats and drones. Furthermore, the integration of advanced fire control systems and network-

centric capabilities has improved the effectiveness of naval gun systems in cooperative engagement scenarios. Innovation and technological progress drive the development of next-generation naval gun systems. Defense contractors invest in research and development to stay at the forefront of technological advancements, resulting in the creation of more capable and sophisticated systems. This competitive edge not only meets the evolving needs of naval forces but also fosters international demand, bolstering the global naval gun system market.

Key Market Challenges

Evolving Threat Landscape

One of the most prominent challenges in the global naval gun system market is the constantly evolving threat landscape. As technology advances, so do the capabilities of potential adversaries, including state actors, non-state actors, and terrorist organizations. These evolving threats can render existing naval gun systems obsolete and necessitate the development of new, more advanced systems. The emergence of advanced anti-ship missiles, unmanned surface and underwater vehicles, and electronic warfare capabilities poses a serious challenge to traditional naval gun systems. These systems need to be capable of intercepting and neutralizing such threats effectively. This requires substantial research and development efforts, which can be costly and time-consuming. Furthermore, the growing concern over cyber threats adds an additional layer of complexity to the naval gun system market. Ensuring that these systems are protected against cyberattacks is crucial to maintaining operational readiness. This threat landscape requires navies and defense contractors to continuously invest in research and development to stay ahead of potential adversaries.

Budget Constraints

Naval gun systems are a significant expense for any country's defense budget. With limited resources and competing demands for funding, budget constraints are a major challenge for the global naval gun system market. Governments often need to make difficult choices when allocating funds, and defense spending is not exempt from this scrutiny. The cost of developing, procuring, and maintaining naval gun systems is substantial. It includes expenses for research and development, production, installation, training, and ongoing maintenance. These costs can strain defense budgets, especially when governments face economic downturns or prioritize other areas of national security. Budget constraints can lead to delays in procurement programs, reduced fleet sizes, or even the cancellation of projects altogether. These challenges not only affect

the growth of the naval gun system market but also impact a nation's maritime capabilities and preparedness.

Geopolitical Tensions and Export Controls

Geopolitical tensions between nations can have a significant impact on the global naval gun system market. These tensions can lead to restrictions on the export of defense technologies, including naval gun systems. Export controls and embargoes can limit the potential customer base for defense contractors and hinder international collaboration. Governments may impose strict regulations on the export of naval gun systems to specific regions or countries based on their foreign policy considerations and national security interests. Such restrictions can affect market growth by preventing defense contractors from selling their products to a broader range of customers. In addition, the threat of sanctions can deter potential customers from entering into agreements with certain suppliers, further complicating the market landscape. The complexity of export controls and the changing geopolitical environment make it challenging for defense contractors to navigate this terrain effectively.

Technological Advancements and Competition

The naval gun system market is highly competitive, with various countries and defense contractors vying for market share. Technological advancements and innovations are critical for maintaining a competitive edge. However, these advancements also present challenges. As technology evolves, defense contractors must constantly invest in research and development to stay at the forefront of naval gun system capabilities. The rapid pace of innovation can make it difficult for established systems to remain competitive, as newer and more advanced options become available. Moreover, the competitive nature of the market can result in cost-cutting measures, which may compromise the quality and effectiveness of naval gun systems. Lower-cost alternatives from emerging players can disrupt the market dynamics, posing a challenge to established defense contractors. Furthermore, the transfer of technology and intellectual property rights in international collaborations can be a source of tension, especially when partners may have differing strategic interests. Balancing the need for technological advancement with the cost-effectiveness of naval gun systems is an ongoing challenge in the market.

Integration and Modernization of Existing Platforms

Many naval forces around the world rely on existing platforms that have been in service

for decades. Integrating modern naval gun systems onto these platforms is a complex challenge. The systems need to be adapted to fit the existing infrastructure, which may require extensive modifications and upgrades. Integrating modern technologies such as advanced fire control systems, automation, and communication networks can be expensive and time-consuming. Moreover, the modernization of existing naval gun systems is essential to ensure they remain effective and relevant. This can involve retrofitting older systems with new components and technologies to extend their operational life. It is a challenge to strike a balance between the cost of modernization and the performance improvements it delivers. Additionally, interoperability among different naval gun systems and other defense systems within a navy is crucial. Ensuring seamless communication and coordination between various components is a complex task. Modernizing and integrating naval gun systems without compromising the overall combat effectiveness of a fleet is an ongoing challenge.

Key Market Trends

Technological Advancements and Precision Munitions

Technological advancements and the proliferation of precision munitions are pivotal trends in the global naval gun system market. Modern naval gun systems are evolving to incorporate cutting-edge technologies and ammunition, enhancing their accuracy, range, and versatility. One of the driving factors behind this trend is the continuous development of guided and precision-guided munitions. These munitions are designed to offer greater accuracy and effectiveness, reducing the number of rounds required to achieve mission objectives. Precision munitions can be employed for various purposes, including anti-ship warfare, naval gunfire support for ground forces, and air defense. The integration of advanced fire control systems and sensors further enhances the precision and effectiveness of naval gun systems. These systems enable rapid target acquisition, tracking, and engagement, even in challenging environments. Modern naval guns are equipped with advanced radars, electro-optical and infrared sensors, and ballistic computers that can calculate complex firing solutions, considering factors like range, bearing, target motion, and environmental conditions. Additionally, the development of extended-range munitions allows naval gun systems to engage targets at greater distances, expanding the area of influence for naval forces. The ability to strike targets from over-the-horizon distances significantly enhances naval capabilities, enabling ships to remain at a safe standoff while effectively engaging hostile threats. Furthermore, the trend of using multi-role naval guns is gaining momentum. These guns can engage a variety of targets, from fast-attack boats and aircraft to land-based threats. The flexibility of such systems reduces the need for multiple specialized

weapons, simplifying logistics and increasing mission readiness.

One example of technological advancement in naval gun systems is the integration of the Advanced Gun System (AGS) on the Zumwalt-class destroyer. The AGS features a 155mm gun that can launch Long Range Land Attack Projectiles (LRLAP) with precision-guided capabilities, effectively engaging land targets from a significant distance. The challenge in harnessing these technological advancements lies in ensuring interoperability and compatibility between naval gun systems, ammunition, and ships. As navies seek to modernize their fleets, integrating new technology and munitions with existing platforms can be complex. Additionally, advancements in electronic warfare and countermeasures will require ongoing updates to ensure naval gun systems maintain their effectiveness in an ever-evolving threat environment.

Geopolitical Developments and Naval Modernization

Geopolitical developments and naval modernization efforts are fundamental trends in the global naval gun system market. Shifts in international relations, territorial disputes, and evolving defense priorities are driving the demand for modern naval capabilities and the associated armament. One of the driving factors behind this trend is the growing importance of maritime territories and resources. As global trade continues to rely on the world's oceans, the control of key maritime chokepoints and territorial waters has become a strategic imperative for nations. Geopolitical tensions and territorial disputes, such as those in the South China Sea and the Baltic Sea, have underscored the need for strong naval forces and modern naval gun systems to protect territorial integrity and assert influence.

Naval modernization efforts are particularly evident in the Asia-Pacific region, where nations are investing heavily in naval capabilities. Countries like China, India, and Japan are expanding and upgrading their naval fleets, leading to an increased demand for advanced naval gun systems. This modernization drive is fueled by a desire to secure economic interests, protect sea lanes, and exert influence in the region. Naval modernization also extends to other parts of the world, with nations in Europe, the Middle East, and Latin America pursuing efforts to enhance their naval forces. This global trend results in a growing demand for modern naval gun systems that can provide the required firepower and versatility. The challenge associated with this trend lies in ensuring that naval gun systems remain interoperable and effective within evolving multinational coalitions. As nations seek to bolster their naval forces, they must coordinate and standardize equipment and capabilities to facilitate joint operations. Achieving interoperability is a complex process that requires coordination, standardized

communication protocols, and compatible weapon systems. Additionally, the modernization of naval gun systems must consider cost-effectiveness and budget constraints. While the need for modern capabilities is clear, defense budgets can be limited, necessitating careful procurement planning and resource allocation to meet modernization objectives without exceeding financial constraints. Efforts to address this challenge include international cooperation and defense partnerships. Collaborative programs and technology sharing can help nations develop and maintain modern naval gun systems while sharing the financial burden. Additionally, governments can explore multi-role capabilities and modular design approaches to ensure naval gun systems can adapt to changing mission profiles and requirements.

Evolving Military Doctrines and Asymmetric Threats

Evolving military doctrines and the rise of asymmetric threats are driving changes in the global naval gun system market. As naval forces adapt to new challenges, naval gun systems are being reevaluated to address unconventional threats and meet evolving operational requirements. One of the driving factors behind this trend is the shift in military doctrines and strategies. Navies are increasingly focused on agile and flexible strategies that emphasize expeditionary warfare, littoral operations, and power projection. As a result, naval gun systems must be capable of supporting a broader range of operations, from close-in engagement in coastal waters to high-seas confrontations. The rise of asymmetric threats, including terrorism, piracy, and non-state actors, is another key factor. Asymmetric threats often manifest in unconventional ways, such as small-boat attacks, unmanned aerial systems, and the use of stealthy or low-cost tactics. Naval gun systems need to adapt to address these emerging threats effectively. Naval forces are also placing greater emphasis on providing coastal security and countering irregular warfare. Naval gun systems play a critical role in these missions, as they can provide responsive and scalable firepower to support ground forces, interdict smuggling operations, and deter potential adversaries.

Furthermore, naval gun systems are being evaluated for their ability to engage threats in littoral environments. These systems need to provide precise and rapid firepower to address threats in confined and congested coastal areas while minimizing collateral damage. The flexibility to switch between precision-guided munitions for specific targets and area-denial munitions to deter adversaries is increasingly important. The challenge in addressing these trends is in ensuring that naval gun systems remain adaptable and versatile. Meeting the requirements of evolving military doctrines and asymmetric threats requires platforms and munitions that can be rapidly reconfigured and equipped with a diverse range of ammunition. Additionally, naval forces must invest in training

and readiness to effectively employ these systems in dynamic and unpredictable operational environments. Efforts to address this challenge include the development of modular and multi-role naval gun systems. These systems can be reconfigured with different mission packages to address specific threats and operational requirements. Training programs and exercises that simulate asymmetric threats are also valuable in preparing naval forces to counter unconventional challenges effectively.

Segmental Insights

Weapon Type Analysis

Unlike any other gun on the market, the EM Railgun fires projectiles farther and faster by using high-power electromagnetic energy instead of explosive chemical propellants. When equipped with armament, a railgun may fire projectiles at targets at speeds far faster than those of any modern naval gun. It might effectively intercept air threats, particularly cruise missiles designed to prevent deliveries. When compared to missiles with similar range, railguns also offer a significantly larger ammunition capacity and a declining cost with increasing engagement.

Regional Insights

Given the presence of mounted market participants in this area, it is expected that North America lead the global naval gun system market. The competitive technical advancement and its adoption in North America, which have resulted from investment for research and development, have also accelerated growth in this region. This location serves as the primary naval subsystems marketplace as well as a major hub for production. The primary market within the location now is the United States. It is anticipated that in the army simulation and education business, Europe would emerge as a major player. The market for naval gun systems is expanding globally because of rising cross-border conflicts and the rise of terrorist sports.

Key Market Players

BAE Systems plc

Lockheed Martin Corporation

Raytheon Company

Saab AB

Thales Group

General Dynamics Corporation

Kratos Defense & Security Solutions, Inc.

Northrop Grumman Corporation

Meggitt PLC

Israel Aerospace Industries

Report Scope:

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

Naval Gun System Market, By Platform Type:

Large Ship

Medium Ship

Small Ships

Naval Gun System Market, By Weapon Type:

Rail Gun

Laser Gun

Naval Gun System Market, By Caliber Size:

200mm

Naval Gun System Market, By Region:

Asia-Pacific

China

India

Japan

Indonesia

Thailand

South Korea

Australia

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

North America

United States

Canada

Mexico

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Turkey

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Naval Gun System Market.

Available Customizations:

Global Naval Gun System 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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