

North America Large Caliber Ammunition Market By Caliber Type (40-60mm, Above 60mm) By End User (Naval Forces, Ground Forces), By Country, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

The North America Large Caliber Ammunition Market was valued at USD 1.87 Billion in 2024 and is expected to reach USD 3.02 Billion by 2030 with a CAGR of 2.03% during the forecast period. The North America Large Caliber Ammunition market is experiencing rapid growth, driven by several factors, including rising defense budgets and the modernization of military equipment across the region. The U.S. military, as the largest consumer, continues to invest heavily in advanced weaponry, including large caliber ammunition for land, air, and naval forces. Geopolitical tensions and security concerns also contribute to the growing demand for more powerful and precise ammunition. Also, technological advancements in ammunition design, increased focus on defense readiness, and military training programs further support market growth. These factors collectively strengthen the demand for large caliber ammunition in North America.

Market Drivers

Growing Geopolitical Tension

Growing geopolitical tensions are a major driver for the North America Large Caliber Ammunition market. As global security dynamics shift, countries like the United States and Canada are intensifying their defense capabilities to address emerging threats. Geopolitical instability, including conflicts, territorial disputes, and rising threats from adversarial nations, has prompted North American nations to enhance their military preparedness, with an increased focus on advanced weaponry and ammunition

systems.

The U.S. has been modernizing its military arsenal, incorporating more sophisticated and powerful ammunition to counter both conventional and asymmetrical warfare tactics. The rising need for superior firepower in the face of potential threats from rival nations, such as China and Russia, has driven demand for large caliber ammunition used in tanks, artillery, and naval systems. Also, the U.S. military's involvement in international peacekeeping, counterterrorism operations, and defense collaborations with NATO allies further fuels the demand for large caliber rounds. As these geopolitical tensions escalate, the North American defense industry is increasingly reliant on cutting-edge ammunition technology to maintain strategic advantage and enhance combat readiness. Hence, the growing geopolitical landscape and the need for enhanced military deterrence and preparedness are significant drivers for the expansion of the large caliber ammunition market in North America.

Growing Defense Budget Across the Region

The growing defense budgets across North America are a significant driver for the large caliber ammunition market. As a part of this, according to a recent study, as of 2023, the US military spent over USD 820.3 billion, accounting for nearly 13.3% of the total federal budget for that fiscal year. In March 2023, the Department of Defense (DoD) proposed USD 842.0 billion for 2024, representing a 2.6% increase. As defense spending continues to rise, particularly in the United States, there is a greater focus on enhancing military capabilities, including the acquisition of advanced ammunition. The U.S. government has consistently increased its defense budget to modernize its military infrastructure, update weapon systems, and ensure combat readiness, all of which involve a heavy reliance on large caliber ammunition for tanks, artillery, naval vessels, and aircraft.

Increased funding is directed toward improving the effectiveness of defense systems, which includes acquiring more sophisticated and powerful ammunition for long-range strikes, precision targeting, and superior firepower. These investments are designed to address a wide range of military needs, from conventional warfare to counterterrorism operations. As global security concerns evolve, North American nations are allocating more resources to ensure their defense forces are equipped with the best available technology. The rise in defense budgets also supports ongoing research and development into advanced ammunition types, such as guided projectiles, high-explosive rounds, and armor-piercing shells, which require significant investment. As defense spending continues to grow, the demand for large caliber ammunition will

remain strong, positioning the market for continued expansion across North America.

Rising Government Support to Strengthen the Defense Sector

Rising government support to strengthen the defense sector is a key driver for the North America Large Caliber Ammunition market. As a part of this, as of March 2024, the Biden-Harris Administration submitted to Congress a planned Fiscal Year (FY) 2025 budget proposal of USD 849.8 billion for the Department of Defense (DoD), in accordance with the caps authorized by Congress under the Fiscal Responsibility Act (FRA) of 2023. The FY 2025 defense budget request includes the capabilities and investments needed to advance the Secretary's three top priorities: defending the United States, caring for our people, and achieving success through teamwork. Governments, particularly in the United States and Canada, are increasingly investing in their defense industries to bolster national security, modernize military capabilities, and maintain a strategic advantage in global defense systems. As part of this effort, significant resources are being directed toward upgrading military weaponry, which includes the procurement of advanced large caliber ammunition for various applications, such as artillery, armored vehicles, tanks, and naval vessels. In the U.S., defense budget allocations have been consistently increasing, with a focus on enhancing the readiness and capabilities of the armed forces. This includes upgrading existing weapon systems, developing new technologies, and ensuring adequate supplies of high-performance ammunition. Also, government-backed initiatives support defense manufacturers, encouraging them to innovate and meet the growing demand for advanced ammunition types, including guided projectiles and high-explosive rounds. Also, as geopolitical tensions rise and the threat landscape evolves, governments are prioritizing the need for enhanced deterrence and preparedness. By strengthening defense capabilities, governments are driving the demand for more powerful and effective large caliber ammunition. The continued government support for defense sector growth will further fuel the expansion of the large caliber ammunition market across North America, ensuring its role in maintaining military superiority.

Key Market Challenges

Higher Manufacturing Cost

Higher manufacturing costs present a significant challenge to the North America Large Caliber Ammunition market. The production of large caliber ammunition involves complex processes, including sourcing raw materials, precision engineering, and high-quality manufacturing standards to meet military specifications. The cost of key

components, such as metals (e.g., brass, steel, and aluminum), explosives, and propellants, has been rising due to fluctuating commodity prices and supply chain disruptions. This increase in raw material costs directly impacts the overall production expenses of ammunition manufacturers.

Also, advanced technologies used in the development of specialized ammunition types, such as guided projectiles, armor-piercing rounds, and high-explosive shells, require significant research and development investments. These innovations are crucial for maintaining military superiority but add to the financial burden of production. The need for stringent quality control and regulatory compliance further drives up the costs associated with manufacturing large caliber ammunition. Also, the requirement for sophisticated manufacturing facilities, skilled labor, and stringent safety measures increases operational costs. As defense budgets remain constrained in some regions, manufacturers may struggle to balance the growing demand for advanced ammunition with the rising costs of production. These higher manufacturing costs could limit the profitability of ammunition producers and potentially impact the affordability and availability of large caliber ammunition in the market.

Stringent Regulatory Standards

Stringent regulatory standards present a significant challenge for the North America Large Caliber Ammunition market. Ammunition production, especially for military and defense applications, is subject to a range of regulations that aim to ensure safety, quality, and compliance with environmental standards. These regulations are enforced by various agencies, including the U.S. Department of Defense, the Environmental Protection Agency (EPA), and other federal and state authorities, making compliance a complex and costly process.

Manufacturers must adhere to strict specifications regarding the production, handling, and storage of large caliber ammunition. This includes meeting safety standards for both workers and end-users, ensuring that the ammunition performs reliably in different combat scenarios. Also, there are regulations surrounding the disposal of hazardous materials, such as explosives and chemical propellants, which further add to production costs. Environmental regulations also impact manufacturing processes, with increasing pressure to reduce the environmental footprint of ammunition production. This has led to the need for more sustainable practices, such as the use of environmentally friendly propellants and materials, adding to the cost of manufacturing. Also, export controls and international regulations on arms sales complicate the ability to distribute large caliber ammunition across borders, limiting market access. The complexity of adhering to these

stringent regulatory standards can delay production timelines, increase costs, and limit the flexibility of ammunition manufacturers in the market.

Key Market Trends

Rising Interest in Multi-Role Ammunition

Rising interest in multi-role ammunition is a prominent trend in the North America Large Caliber Ammunition market. Multi-role ammunition refers to rounds designed for versatility, capable of serving multiple functions, such as anti-tank, anti-aircraft, and anti-personnel roles. As military operations become more complex and dynamic, there is increasing demand for ammunition that can be adapted to various combat scenarios without needing a different type for each mission.

This trend is driven by the need for cost-effective and efficient solutions that minimize logistical challenges, reduce the number of different ammunition types required, and enhance operational flexibility. Multi-role ammunition allows military forces to optimize their inventories and streamline supply chains, ultimately improving combat readiness and effectiveness. Also, advancements in technology have enabled the development of more sophisticated multi-role rounds, including guided projectiles and precision-strike capabilities. These innovations allow for greater accuracy, reduced collateral damage, and improved targeting efficiency across different platforms, from tanks to naval vessels and aircraft. As North American defense forces continue to modernize and prioritize versatility in their weaponry, the demand for multi-role ammunition is expected to grow, influencing both the manufacturing and design trends in the large caliber ammunition market.

Automation in Ammunition Manufacturing

Automation in ammunition manufacturing is a growing trend in the North America Large Caliber Ammunition market, driven by the need for increased production efficiency, consistency, and cost reduction. As demand for advanced ammunition rises, manufacturers are turning to automated technologies to streamline the production process. Automated systems help speed up tasks such as loading, assembly, quality control, and packaging, minimizing human error and ensuring a higher level of precision in the manufacturing of large caliber rounds.

Robotics, artificial intelligence (AI), and advanced machine learning are being incorporated into production lines to optimize workflows, reduce labor costs, and

improve throughput. Automation also allows for greater scalability in production, enabling manufacturers to meet the rising demand from military and defense sectors efficiently. With reduced production time, manufacturers can deliver large volumes of ammunition in shorter timeframes, which is critical in times of heightened military activity or geopolitical tension. Also, automation plays a role in maintaining high safety standards in ammunition production by reducing human exposure to dangerous materials and processes. As North American defense forces continue to prioritize high-quality, rapidly deployable weaponry, automation in ammunition manufacturing is poised to shape the future of the large caliber ammunition market, ensuring more efficient, reliable, and cost-effective production methods.

Advancements In Precision-Guided Projectiles

Advancements in precision-guided projectiles are a significant trend in the North America Large Caliber Ammunition market. With the increasing emphasis on minimizing collateral damage and enhancing targeting accuracy, the development of precision-guided ammunition has become crucial for modern military operations. These projectiles are equipped with advanced guidance systems, such as GPS, laser, and infrared, allowing for pinpoint accuracy over long distances, even in complex combat environments.

The adoption of precision-guided projectiles offers multiple advantages, including improved effectiveness in neutralizing high-value or heavily fortified targets, while reducing the risk of civilian casualties. These rounds are used across various platforms, including tanks, artillery, and naval guns, and have become an integral part of modern warfare strategies. Technological innovations, including better guidance systems and more reliable fuses, have significantly enhanced the performance of large caliber ammunition. As a result, defense forces in North America are increasingly prioritizing these advanced rounds to ensure higher mission success rates in both conventional and asymmetric warfare. With rising defense budgets and continued investments in R&D, the demand for precision-guided projectiles in the North American market is expected to grow, shaping the future of large caliber ammunition with greater efficiency, accuracy, and operational flexibility.

Segmental Insights

Caliber Type Insights

The Above 60mm segment dominates the North America Large Caliber Ammunition

market, due to its widespread use in advanced military systems, including mortars, tanks, and artillery. Ammunition in this category is critical for long-range precision strikes, anti-tank operations, and heavy artillery engagements. The U.S. military, being the largest consumer, relies heavily on larger calibers for strategic defense purposes, and ongoing investments in modernizing weaponry have increased the demand for these rounds. The versatility, firepower, and effectiveness of above 60mm ammunition in both conventional and specialized operations further contribute to its dominance in the market.

Regional Insights

The United States dominated the North America Large Caliber Ammunition market, due to its substantial defense budget and leading military presence globally. As the largest consumer of ammunition, the U.S. invests heavily in advanced weaponry and military modernization, driving demand for large caliber rounds used in tanks, artillery, and naval systems. The U.S. military's focus on enhancing firepower, precision, and operational readiness further supports the dominance of large caliber ammunition. Also, the country's strong defense manufacturing base, technological advancements, and extensive research and development in ammunition design play a key role in maintaining its market leadership in North America.

Key Market Players

Northrop Grumman

Rheinmetall AG

Inductotherm Group

Radyne Corporation

General Dynamics Ordnance & Tactical Systems Inc

Saab AB

Denel Pretoria Metal Pressings (PMP)

BAE Systems

Singapore Technologies Engineering Ltd

Global Ordnance (GO)

Report Scope:

In this report, the North America Large Caliber Ammunition market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

North America Large Caliber Ammunition Market, By Caliber Type:

40-60mm

Above 60mm

North America Large Caliber Ammunition Market, By End User:

Naval Forces

Ground Forces

North America Large Caliber Ammunition Market, By Country:

United States

Canada

Mexico

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the North America Large Caliber Ammunition market.

Available Customizations:

North America Large Caliber Ammunition 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. INTRODUCTION

- 1.1. Product Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

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. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. NORTH AMERICA LARGE CALIBER AMMUNITION MARKET OUTLOOK

- 4.1. Market Size & Forecast
 - 4.1.1. By Value
- 4.2. Market Share & Forecast
 - 4.2.1. By Caliber Type Market Share Analysis (40-60mm, Above 60mm)
 - 4.2.2. By End User Market Share Analysis (Naval Forces, Ground Forces)
 - 4.2.3. By Country Market Share Analysis
 - 4.2.3.1. United States Market Share Analysis
 - 4.2.3.2. Canada Market Share Analysis
 - 4.2.3.3. Mexico Market Share Analysis
 - 4.2.4. By Top 5 Companies Market Share Analysis, Others (2024)

4.3. North America Large Caliber Ammunition Market Mapping & Opportunity Assessment

- 4.3.1. By Caliber Type Market Mapping & Opportunity Assessment
- 4.3.2. By End User Market Mapping & Opportunity Assessment
- 4.3.3. By Regional Market Mapping & Opportunity Assessment

5. UNITED STATES LARGE CALIBER AMMUNITION MARKET OUTLOOK

5.1. Market Size & Forecast

- 5.1.1. By Value

5.2. Market Share & Forecast

- 5.2.1. By Caliber Type Market Share Analysis
- 5.2.2. By End User Market Share Analysis

6. CANADA LARGE CALIBER AMMUNITION MARKET OUTLOOK

6.1. Market Size & Forecast

- 6.1.1. By Value

6.2. Market Share & Forecast

- 6.2.1. By Caliber Type Market Share Analysis
- 6.2.2. By End User Market Share Analysis

7. MEXICO LARGE CALIBER AMMUNITION MARKET OUTLOOK

7.1. Market Size & Forecast

- 7.1.1. By Value

7.2. Market Share & Forecast

- 7.2.1. By Caliber Type Market Share Analysis
- 7.2.2. By End User Market Share Analysis

8. MARKET DYNAMICS

8.1. Drivers

8.2. Challenges

9. IMPACT OF COVID-19 ON NORTH AMERICA LARGE CALIBER AMMUNITION MARKET

9.1. Impact Assessment Model

9.1.1. Key Segments Impacted

9.1.2. Key Regions Impacted

9.1.3. Key Countries Impacted

10. MARKET TRENDS & DEVELOPMENTS

11. COMPETITIVE LANDSCAPE

11.1. Company Profiles

11.1.1. Northrop Grumman

11.1.1.1. Company Details

11.1.1.2. Products

11.1.1.3. Financials (As Per Availability)

11.1.1.4. Key Market Focus & Geographical Presence

11.1.1.5. Recent Developments

11.1.1.6. Key Management Personnel

11.1.2. Rheinmetall AG

11.1.2.1. Company Details

11.1.2.2. Products

11.1.2.3. Financials (As Per Availability)

11.1.2.4. Key Market Focus & Geographical Presence

11.1.2.5. Recent Developments

11.1.2.6. Key Management Personnel

11.1.3. Inductotherm Group

11.1.3.1. Company Details

11.1.3.2. Products

11.1.3.3. Financials (As Per Availability)

11.1.3.4. Key Market Focus & Geographical Presence

11.1.3.5. Recent Developments

11.1.3.6. Key Management Personnel

11.1.4. Radyne Corporation

11.1.4.1. Company Details

11.1.4.2. Products

11.1.4.3. Financials (As Per Availability)

11.1.4.4. Key Market Focus & Geographical Presence

11.1.4.5. Recent Developments

11.1.4.6. Key Management Personnel

11.1.5. General Dynamics Ordnance & Tactical Systems Inc

11.1.5.1. Company Details

- 11.1.5.2. Products
- 11.1.5.3. Financials (As Per Availability)
- 11.1.5.4. Key Market Focus & Geographical Presence
- 11.1.5.5. Recent Developments
- 11.1.5.6. Key Management Personnel
- 11.1.6. Saab AB
 - 11.1.6.1. Company Details
 - 11.1.6.2. Products
 - 11.1.6.3. Financials (As Per Availability)
 - 11.1.6.4. Key Market Focus & Geographical Presence
 - 11.1.6.5. Recent Developments
 - 11.1.6.6. Key Management Personnel
- 11.1.7. Denel Pretoria Metal Pressings (PMP)
 - 11.1.7.1. Company Details
 - 11.1.7.2. Products
 - 11.1.7.3. Financials (As Per Availability)
 - 11.1.7.4. Key Market Focus & Geographical Presence
 - 11.1.7.5. Recent Developments
 - 11.1.7.6. Key Management Personnel
- 11.1.8. BAE Systems
 - 11.1.8.1. Company Details
 - 11.1.8.2. Products
 - 11.1.8.3. Financials (As Per Availability)
 - 11.1.8.4. Key Market Focus & Geographical Presence
 - 11.1.8.5. Recent Developments
 - 11.1.8.6. Key Management Personnel
- 11.1.9. Singapore Technologies Engineering Ltd
 - 11.1.9.1. Company Details
 - 11.1.9.2. Products
 - 11.1.9.3. Financials (As Per Availability)
 - 11.1.9.4. Key Market Focus & Geographical Presence
 - 11.1.9.5. Recent Developments
 - 11.1.9.6. Key Management Personnel
- 11.1.10. Global Ordnance (GO)
 - 11.1.10.1. Company Details
 - 11.1.10.2. Products
 - 11.1.10.3. Financials (As Per Availability)
 - 11.1.10.4. Key Market Focus & Geographical Presence
 - 11.1.10.5. Recent Developments

11.1.10.6. Key Management Personnel

12. STRATEGIC RECOMMENDATIONS/ACTION PLAN

12.1. Key Focus Areas

12.2. Target Caliber Type

12.3. Target End User

13. ABOUT US & DISCLAIMER

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