

# **Precision Guided Artillery Ammunition Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Caliber (Medium Caliber, Large Caliber), By Technology (GPS Guided, Laser Guided, Inertial Navigation), By Region, By Competition, 2020-2030F**

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## **Abstracts**

The Global Precision Guided Artillery Ammunition Market was valued at USD 2.01 Billion in 2024 and is expected to reach USD 2.49 Billion by 2030 with a CAGR of 3.69% during the forecast period. The Global Precision Guided Artillery Ammunition Market is witnessing significant growth, driven by advancements in military technologies and the increasing need for accuracy in modern warfare. Precision-guided artillery offers enhanced targeting capabilities, reducing collateral damage and improving mission effectiveness. Key market drivers include rising defense budgets, geopolitical tensions, and technological innovations like GPS guidance and laser targeting systems. The market is segmented by type (e.g., guided projectiles and shells), range, and application (land, naval, or air defense). Leading players focus on research and development to create next-generation ammunition, while governments prioritize acquiring sophisticated systems to strengthen their defense capabilities.

### **Market Drivers**

#### **Advancements in Military Technology**

The global precision-guided artillery ammunition market is propelled by rapid advancements in military technology, particularly in guidance systems and targeting mechanisms. Modern artillery shells are increasingly equipped with GPS, inertial

navigation systems (INS), and laser guidance technologies, enhancing accuracy and reducing the margin of error in battlefield operations. These advancements cater to the demand for precise targeting, enabling militaries to neutralize threats with minimal collateral damage. Furthermore, innovations like autonomous targeting and integration with advanced fire-control systems are pushing the boundaries of efficiency, making precision-guided ammunition a critical investment for defense forces worldwide.

### Increasing Defense Budgets

The rise in global defense budgets, driven by geopolitical tensions and escalating regional conflicts, is a major factor fueling the market for precision-guided artillery ammunition. Many countries are modernizing their military arsenals to counter emerging threats and maintain strategic superiority. For instance, the United States, China, and India have significantly increased their defense spending, allocating substantial funds to procure advanced weaponry, including precision-guided munitions. In 2024, Indian government allocated ₹6.22 lakh crore to the Ministry of Defence, marking a 4.8% increase from the previous year. This allocation is the highest among all ministries and aims to promote self-reliance in defense technology and manufacturing. This trend reflects a growing recognition of the need for high-precision artillery solutions to enhance battlefield readiness and operational effectiveness.

### Geopolitical Instabilities and Conflicts

Geopolitical tensions and conflicts in regions such as the Middle East, Eastern Europe, and the Asia-Pacific are driving the demand for precision-guided artillery ammunition. Nations involved in these volatile zones are prioritizing the deployment of advanced artillery systems capable of delivering pinpoint accuracy in hostile environments. In 2024, the U.S. Army announced that Congress increased its funding request to USD 6 billion for the procurement and production of 155mm artillery rounds. This allocation is aimed at replenishing the stocks depleted due to shipments to Ukraine and Israel. The enhanced funding reflects the ongoing military support needs amid global conflicts. Precision-guided munitions are particularly valuable in urban warfare and counter-insurgency operations, where minimizing civilian casualties and infrastructure damage is paramount. The increasing frequency of border skirmishes and asymmetric warfare further underscores the strategic importance of precision artillery, prompting governments to invest heavily in their development and acquisition.

### Key Market Challenges

## High Development and Procurement Costs

One of the most significant challenges facing the global precision-guided artillery ammunition market is the high cost associated with the development and procurement of these advanced systems. Precision-guided munitions require sophisticated technologies such as GPS, laser guidance, and inertial navigation systems, which involve extensive research and development (R&D) expenditures. For smaller or economically constrained nations, allocating substantial defense budgets for such advanced artillery systems can be prohibitive. Additionally, maintenance, training, and integration costs further strain financial resources, limiting widespread adoption. Even for larger economies, balancing the cost of modernizing existing arsenals with other defense priorities poses a considerable challenge.

## Technological Limitations and Vulnerabilities

While precision-guided artillery systems represent a leap in military capabilities, they are not without technological limitations and vulnerabilities. These systems rely heavily on satellite-based navigation like GPS, which can be disrupted by electronic jamming, signal spoofing, or cyberattacks. Adversaries with advanced electronic warfare capabilities can exploit these vulnerabilities to degrade the effectiveness of precision-guided munitions. Furthermore, reliance on favorable environmental conditions for some guidance mechanisms, such as laser designators, can limit operational effectiveness in adverse weather conditions or during nighttime operations. Addressing these limitations requires ongoing investments in robust and resilient technologies, which adds to the complexity and cost.

## Key Market Trends

### Integration of Artificial Intelligence and Machine Learning

The integration of Artificial Intelligence (AI) and Machine Learning (ML) into precision-guided artillery systems is a transformative trend in the market. These technologies enable advanced targeting solutions, real-time decision-making, and enhanced adaptability during operations. AI-driven algorithms are increasingly used for trajectory optimization, threat prioritization, and predictive maintenance of ammunition systems, ensuring higher operational efficiency. Additionally, ML models improve guidance accuracy by learning from historical battlefield data and adapting to dynamic scenarios. These advancements not only elevate the performance of artillery systems but also

reduce the reliance on human intervention, marking a significant leap in automated warfare capabilities.

### Increasing Focus on Multi-Domain Operations

The rising emphasis on multi-domain operations (MDO) is reshaping the development and deployment of precision-guided artillery ammunition. Modern battlefields require seamless coordination across land, air, sea, space, and cyber domains, prompting the evolution of artillery systems capable of integrating with multi-domain command structures. Precision-guided munitions are being designed to communicate with advanced networks and sensors, ensuring real-time information sharing and synchronized strikes. This trend aligns with the strategic objectives of major militaries, such as the U.S. Department of Defense's Joint All-Domain Command and Control (JADC2) initiative, which seeks to achieve unparalleled coordination across diverse operational landscapes.

### Rising Adoption of Indigenous Manufacturing and Development

Countries are increasingly focusing on indigenous manufacturing and development of precision-guided artillery systems to reduce dependency on foreign suppliers and enhance self-reliance in defense capabilities. Governments are supporting local defense industries through initiatives like Make in India, offset policies, and joint ventures between domestic and international companies. Indigenous programs allow nations to develop cost-effective, customized solutions tailored to specific operational needs while fostering local expertise and technology transfers. This trend not only boosts the competitiveness of domestic manufacturers but also ensures a more resilient and self-sufficient defense ecosystem, especially in the face of geopolitical uncertainties and supply chain disruptions.

### Segmental Insights

#### Caliber Insights

The Medium Caliber segment was the fastest-growing in the Global Precision Guided Artillery Ammunition Market, fueled by rising demand for precision strikes in urban and asymmetric warfare. Medium-caliber ammunition, typically ranging from 20mm to 57mm, offers enhanced maneuverability, reduced collateral damage, and versatility across various platforms, including ground vehicles and naval vessels. The segment benefits from advancements in guidance systems, such as programmable fuzes and

laser-based targeting, making these munitions highly effective for short to medium-range operations. Increasing adoption by military forces worldwide for counter-insurgency and anti-vehicle roles further drives growth, solidifying its importance in modern combat scenarios.

## Regional Insights

North America dominated the Global Precision Guided Artillery Ammunition Market due to its significant defense budgets, advanced military technologies, and strategic emphasis on modernizing defense systems. The United States, as a key player in the region, leads in the development and deployment of precision-guided munitions, investing heavily in research and innovation. The U.S. military's focus on enhancing operational efficiency and precision in combat drives the demand for advanced artillery systems. Furthermore, North America benefits from strong collaborations between defense contractors and government agencies, ensuring cutting-edge solutions for both land and naval operations, solidifying its dominant position in the global market.

## Key Market Players

General Dynamics Corporation

Rheinmetall AG

BAE Systems plc

Saab AB

Nammo AS

MESKO SA

Thales S.A.

Singapore Technologies Engineering Ltd.

MSM Group

Elbit Systems Ltd.

## Report Scope:

In this report, the global Precision Guided Artillery Ammunition Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Precision Guided Artillery Ammunition Market, By Caliber:

Medium Caliber

Large Caliber

### Precision Guided Artillery Ammunition Market, By Technology:

GPS Guided

Laser Guided

Inertial Navigation

### Precision Guided Artillery Ammunition Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

France

Germany

Spain

Italy

United Kingdom

Asia-Pacific

China

Japan

India

Vietnam

South Korea

Australia

Thailand

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

South America

Brazil

Argentina

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the global

*Precision Guided Artillery Ammunition Market – Global Industry Size, Share, Trends, Opportunity, and Forecast,...*

## Precision Guided Artillery Ammunition Market.

### Available Customizations:

Global Precision Guided Artillery 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).



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