

Precision Guided Munition Market – Global Industry Size, Share, Trends Opportunity, and Forecast, Segmented By Speed (Subsonic, Supersonic, Hypersonic), By Launch Platform (Land, Airborne, Naval), By Technology (Infrared, Inertial), By Region, Competition, 2019-2029F

<https://marketpublishers.com/r/P94F0C7D7D61EN.html>

Date: May 2024

Pages: 180

Price: US\$ 4,900.00 (Single User License)

ID: P94F0C7D7D61EN

Abstracts

The Global Precision Guided Munition Market size reached USD 52.85 Billion in 2023 and is expected to grow with a CAGR of 7.06% in the forecast period. The Global Precision Guided Munition (PGM) Market has emerged as a critical segment within the defense industry, witnessing substantial growth and technological advancements. Precision-guided munitions refer to advanced weaponry equipped with guidance systems that significantly enhance accuracy and reduce collateral damage. As military forces worldwide prioritize precision and efficiency, the demand for PGMs continues to rise.

Key players in the market include major defense contractors such as Lockheed Martin, RTX Corporation, and Northrop Grumman, alongside various international suppliers. The market encompasses a range of PGM types, including guided bombs, missiles, and artillery shells, each designed for specific applications and mission requirements. These munitions are equipped with advanced guidance systems such as GPS, inertial navigation, laser guidance, and radar homing, ensuring precise targeting capabilities.

The market's growth is fueled by several factors, including the increasing need for accurate and targeted strikes, enhanced military capabilities, and the ongoing modernization efforts of armed forces globally. Precision-guided munitions offer advantages such as reduced collateral damage, improved mission success rates, and

the ability to engage targets with greater precision, making them indispensable components of contemporary military arsenals.

Technological advancements play a pivotal role in shaping the market, with ongoing research and development efforts focusing on improving guidance systems, increasing range, and enhancing overall munition performance. The integration of artificial intelligence, advanced sensors, and data connectivity further augments the capabilities of precision-guided munitions, enabling more sophisticated targeting and engagement strategies.

Regional dynamics influence the demand for PGMs, with geopolitical tensions and security concerns driving procurement strategies among nations. The Middle East, Asia-Pacific, and North America are particularly active regions in terms of PGM adoption, with conflicts and evolving threat landscapes contributing to sustained market growth.

However, challenges persist, including the high development costs associated with advanced guidance technologies, regulatory restrictions on exports, and ethical considerations related to the use of precision munitions in conflict zones. Additionally, the market is influenced by shifts in defense budgets, international arms control agreements, and geopolitical developments that impact procurement decisions.

In conclusion, the Global Precision Guided Munition Market reflects the evolving landscape of modern warfare, where precision, effectiveness, and reduced collateral damage are paramount. The market's trajectory is closely tied to technological innovations, international security dynamics, and the strategic priorities of defense organizations worldwide, underscoring the critical role of precision-guided munitions in contemporary military strategies.

Key Market Drivers

Increasing Geopolitical Tensions

One of the primary drivers for the Global Precision Guided Munition (PGM) Market is the rising geopolitical tensions and security threats across various regions. Nations are bolstering their defense capabilities in response to evolving geopolitical dynamics, leading to heightened demand for precision-guided munitions. The need for accurate and targeted strikes in complex and contested environments has become a key factor driving the procurement of PGMs by military forces globally.

Growing Emphasis on Precision Warfare

The growing emphasis on precision warfare is a significant driver propelling the demand for precision-guided munitions. Military doctrines worldwide are shifting towards precision-guided capabilities to achieve more accurate and effective engagement of targets while minimizing collateral damage. The ability of PGMs to precisely hit targets, even in challenging operational environments, aligns with the evolving strategies of modern armed forces.

Advancements in Guidance Technologies

Technological advancements in guidance systems play a crucial role in driving the PGM market. Continuous innovations in GPS, inertial navigation, laser guidance, and target recognition technologies enhance the precision and versatility of munitions. Manufacturers are investing in research and development to improve the accuracy, range, and adaptability of guidance systems, meeting the evolving requirements of military users and expanding the market's capabilities.

Modernization Programs and Defense Budgets

Global defense modernization programs and increased defense budgets contribute significantly to the growth of the PGM market. Many countries are investing in upgrading their military capabilities, replacing outdated munitions with advanced precision-guided alternatives. The integration of PGMs into modernization plans aligns with the goal of enhancing military effectiveness and maintaining a competitive edge in the evolving global security landscape.

Shift Towards Multi-Domain Operations

The shift towards multi-domain operations, where military forces operate seamlessly across air, land, sea, space, and cyberspace, has driven the demand for versatile and interoperable precision-guided munitions. PGMs that can be employed across multiple domains provide military commanders with strategic flexibility, enabling integrated and synchronized operations in complex and dynamic environments.

Increasing Threats from Non-State Actors

The rise of non-state actors and asymmetric threats has heightened the need for precision-guided munitions that can effectively counter unconventional challenges.

Precision munitions offer a more targeted and precise response to asymmetric threats, enabling military forces to address specific threats while minimizing the risk to civilian populations and infrastructure.

Focus on Minimizing Collateral Damage

A key driver influencing the adoption of precision-guided munitions is the growing focus on minimizing collateral damage in military operations. Precision munitions allow military forces to strike specific targets with accuracy, reducing the risk of unintended harm to civilians and critical infrastructure. This emphasis on minimizing collateral damage aligns with international humanitarian considerations and ethical considerations in the use of force.

Integration of Artificial Intelligence (AI)

The integration of artificial intelligence (AI) into precision-guided munitions is emerging as a driver shaping the market's future. AI technologies enhance the munitions' ability to autonomously process data, recognize targets, and adjust their trajectories in real-time. This trend represents a paradigm shift in the development of smart and adaptive munitions that can operate with greater autonomy and effectiveness in dynamic operational scenarios.

Key Market Challenges

Stringent Export Controls and Regulations

One of the primary challenges facing the Global Precision Guided Munition (PGM) Market is the existence of stringent export controls and regulations imposed by various countries. Governments implement strict oversight to prevent the proliferation of advanced weaponry, and compliance with international arms control agreements can pose hurdles for manufacturers and exporters, limiting the market's expansion and global reach.

High Development and Procurement Costs

The high development and procurement costs associated with precision-guided munitions represent a significant challenge for both manufacturers and defense organizations. Developing advanced guidance systems, conducting rigorous testing, and ensuring compliance with stringent quality standards contribute to elevated costs.

This poses a financial challenge for defense budgets, impacting the affordability and widespread adoption of precision-guided munitions by military forces.

Technological Complexity and Integration Challenges

The technological complexity of precision-guided munitions poses challenges related to integration into existing military platforms and systems. Ensuring seamless interoperability with various aircraft, vehicles, and naval vessels requires substantial engineering efforts. The integration challenges may result in delays, cost overruns, and compatibility issues, hindering the smooth incorporation of PGMs into military arsenals.

Vulnerability to Cybersecurity Threats

The increasing reliance on sophisticated guidance systems makes precision-guided munitions susceptible to cybersecurity threats. The potential for cyber-attacks targeting the communication links, data processing units, or guidance algorithms raises concerns about the security and reliability of PGMs. Safeguarding these munitions against cyber threats is a critical challenge for manufacturers and defense agencies seeking to maintain operational integrity.

Ethical and Legal Considerations

The use of precision-guided munitions raises ethical and legal considerations, especially concerning civilian casualties and the potential for unintended harm. Striking a balance between military necessity and minimizing collateral damage is a complex challenge, and instances of civilian casualties in conflict zones can lead to public scrutiny, legal inquiries, and diplomatic challenges for the nations employing precision munitions.

Dependency on Global Supply Chains

The PGM market faces challenges associated with dependencies on global supply chains for critical components and materials. Disruptions in the supply chain due to geopolitical tensions, trade restrictions, or natural disasters can lead to delays in production and delivery, affecting the reliability of the supply of precision-guided munitions to end-users.

Adaptation to Asymmetric Threats

The adaptability of precision-guided munitions to asymmetric threats poses challenges in scenarios where unconventional tactics are employed by non-state actors or irregular forces. Ensuring the effectiveness of PGMs in countering unconventional threats, such as guerrilla warfare or terrorist activities, requires continuous innovation and strategic adjustments in the design and deployment of precision munitions.

Public Perception and Opposition

Public perception and opposition to the use of advanced weaponry, including precision-guided munitions, can present challenges for governments and defense organizations. Concerns about the humanitarian impact, ethical considerations, and the potential for misuse may lead to public protests, legal challenges, and calls for more stringent regulations on the development and use of PGMs, impacting their widespread acceptance.

Key Market Trends

Integration of Artificial Intelligence (AI)

A significant trend shaping the Global Precision Guided Munition (PGM) Market is the increasing integration of artificial intelligence (AI) into munition systems. AI technologies enhance the capabilities of PGMs by enabling autonomous target recognition, adaptive guidance, and real-time decision-making. This trend represents a shift towards smart and self-adjusting munitions that can operate with greater precision and effectiveness in dynamic and evolving operational environments.

Advancements in Seeker Technologies

The continuous advancements in seeker technologies are driving a notable trend in the PGM market. Seeker technologies, including radar, infrared, and electro-optical seekers, are critical components of guidance systems. Ongoing innovations in these technologies contribute to improved target acquisition, tracking accuracy, and the ability to engage diverse targets under challenging conditions. Enhanced seekers play a crucial role in increasing the versatility and effectiveness of precision-guided munitions.

Development of Hypersonic Precision Munitions

A trend gaining momentum is the development of hypersonic precision munitions. Hypersonic weapons, capable of traveling at speeds exceeding Mach 5, introduce a

new dimension to precision-guided munitions, enabling rapid response and reducing the time available for adversaries to react. The development and deployment of hypersonic PGMs reflect the industry's pursuit of advanced and faster capabilities to address evolving threats and strategic requirements.

Miniaturization of Guidance Systems

The trend towards miniaturization of guidance systems is influencing the design and capabilities of precision-guided munitions. Miniaturized components, such as microelectromechanical systems (MEMS) and compact sensors, contribute to reducing the size and weight of munitions while maintaining or enhancing their functionality. This trend supports the development of more agile and versatile PGMs suitable for a broader range of platforms and mission profiles.

Increased Connectivity and Data Sharing

Connectivity and data sharing have become integral trends in the PGM market. Precision-guided munitions are increasingly designed to operate within networked environments, allowing for real-time data exchange between munitions, platforms, and command centers. Enhanced connectivity facilitates coordinated and synchronized operations, enabling multiple PGMs to engage targets collaboratively and adapt to dynamic battlefield scenarios.

Focus on Dual-Mode and Multi-Mode Guidance

The industry is witnessing a trend towards the integration of dual-mode and multi-mode guidance systems in precision munitions. Dual-mode systems combine different guidance technologies, such as GPS and laser guidance, providing flexibility in target engagement under various conditions. Multi-mode guidance systems further enhance adaptability by allowing munitions to switch between guidance modes based on the operational environment, improving mission success rates.

Emphasis on Lethality and Target Discrimination

There is a growing emphasis on enhancing the lethality and target discrimination capabilities of precision-guided munitions. Manufacturers are investing in technologies that improve the ability of PGMs to discriminate between targets in cluttered or congested environments, reducing the risk of unintended damage to non-combatants or critical infrastructure. This trend aligns with the pursuit of precision and ethical

considerations in modern warfare.

Rise of Loitering Munitions

The emergence of loitering munitions represents a trend reshaping the PGM landscape. Loitering munitions, also known as kamikaze drones, are designed to loiter over the battlefield, identify targets, and engage them with precision. This trend reflects a shift towards more dynamic and persistent engagement capabilities, allowing military forces to adapt to evolving threats and conduct precision strikes with greater situational awareness.

Segmental Insights

By Speed

Subsonic precision guided munitions refer to munitions that travel at speeds below the speed of sound (Mach 1). Despite being slower than supersonic and hypersonic counterparts, subsonic PGMs offer distinct advantages in certain scenarios. These munitions are often characterized by longer loiter times, providing extended opportunities for target identification and engagement. Subsonic PGMs are well-suited for missions requiring prolonged surveillance or when precise, controlled strikes are essential, making them valuable assets in various operational environments.

Supersonic precision guided munitions operate at speeds surpassing the speed of sound (Mach 1). This category includes munitions that achieve speeds between Mach 1 and Mach 5. The increased velocity enhances the rapid response capabilities of supersonic PGMs, reducing the time available for adversaries to react and evade. These munitions are suitable for time-sensitive missions, where quick target acquisition and engagement are crucial. The versatility of supersonic PGMs makes them effective across a range of operational scenarios, providing a balance between speed and mission flexibility.

Hypersonic precision guided munitions represent the cutting edge of speed in modern warfare, traveling at speeds exceeding Mach 5. The development and deployment of hypersonic PGMs introduce a paradigm shift in strategic capabilities. These munitions offer unparalleled rapidity in target engagement, making them highly effective for time-critical missions and challenging adversaries' defense systems. Hypersonic PGMs provide enhanced survivability due to their speed, agility, and the ability to cover vast distances swiftly. The ongoing trend towards hypersonic development underscores the

importance of achieving unprecedented speeds to address evolving threats and strategic requirements.

Each speed category—subsonic, supersonic, and hypersonic—brings specific advantages to the Precision Guided Munition market, catering to diverse operational needs and strategic objectives. The selection of the appropriate speed category depends on factors such as mission requirements, target characteristics, and the desired balance between rapid response and prolonged loiter capabilities. The evolving landscape of precision-guided munitions reflects a continual pursuit of innovation to meet the dynamic challenges of modern warfare.

Regional Insights

North America stands as a prominent hub in the Global Precision Guided Munition (PGM) Market, characterized by the presence of major defense contractors, robust research and development initiatives, and substantial defense budgets. The United States, in particular, plays a pivotal role in driving technological advancements and innovation within the PGM sector. The region's emphasis on maintaining military superiority, coupled with ongoing conflicts and geopolitical tensions, contributes to a sustained demand for precision-guided munitions. Additionally, collaborative efforts among NATO allies further strengthen North America's position in shaping the global PGM landscape.

Europe is a key player in the Global PGM Market, with various nations investing in the development and acquisition of advanced precision-guided munitions. The European defense industry, supported by countries such as the United Kingdom, France, and Germany, actively contributes to the innovation and production of PGMs. The region's focus on enhancing military capabilities, ensuring strategic autonomy, and addressing evolving security challenges contributes to a steady market growth. Furthermore, collaborative projects and joint defense initiatives among European Union member states foster regional cooperation in the PGM domain.

The Asia-Pacific region is witnessing dynamic growth in the Precision Guided Munition Market, driven by escalating geopolitical tensions, territorial disputes, and military modernization efforts. Nations such as China, India, and Japan are investing significantly in the development and deployment of PGMs to strengthen their defense capabilities. The diverse operational environments, ranging from contested maritime territories to mountainous terrains, influence the demand for versatile PGMs tailored to specific regional challenges. The Asia-Pacific region's evolving security landscape

positions it as a focal point for PGM market expansion.

The Middle East and Africa region experience heightened demand for precision-guided munitions due to ongoing conflicts, security concerns, and the need for advanced military capabilities. Nations in the Middle East, including Saudi Arabia, Israel, and the United Arab Emirates, actively procure PGMs to address regional threats and ensure strategic deterrence. The diverse range of security challenges, from asymmetric warfare to traditional conflicts, shapes the requirements for precision munitions tailored to the specific operational landscapes in the region.

Key Market Players

Lockheed Martin Corporation

BAE Systems Plc

RTX Corporation

MBDA

Israel Aerospace Industries

Elbit Systems Ltd

Saab AB

General Dynamics Corporation

Report Scope:

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

Precision Guided Munition Market, By Speed:

Subsonic

Supersonic

Hypersonic

Precision Guided Munition Market, By Launch Platform:

Land

Airborne

Naval

Precision Guided Munition Market, By Technology:

Infrared

Inertial

Precision Guided Munition Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Precision Guided Munition Market.

Available Customizations:

Global Precision Guided Munition 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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