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Loitering Munition Market: Current Analysis and Forecast (2024-2032)

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Abstracts

The Loitering Munition Market is witnessing a robust growth rate of 12.90% within the forecast period (2024-2032). Loitering munitions or remotely controlled aerial precision strike weapons combine the benefits of unmanned aircraft systems and guided munitions. Modern warfare has been driven primarily by advancements in precision strike capabilities and the growing demand for low-cost, high-precision weapon systems. The growth in this sector is mainly driven by the need for the new age for asymmetric warfare solutions, where loitering munitions give an unusual proposition of surveillance and strike capabilities. Loitering munitions have integrated cutting-edge technologies into their systems so that they can apply artificial intelligence (AI), machine learning, and real-time data processing to improve operation efficiency. Therefore, these systems have advanced features such as enhanced target recognition and autonomous decision-making, with swarm capabilities for enabling coordinated attacks on multiple targets. Additionally, advances in propulsion systems, battery life, and lightweight materials have extended the range, time, and portability of the weapon systems into highly adaptable applications within different combat environments.

Based on type, the loitering munition market is segmented into Autonomous Identification and Positioning Loitering Munition System and Manual Positioning Loitering Munition System. In 2023, the Autonomous Identification and Positioning Loitering Munition System market segment dominated the market and is expected to maintain its leading position throughout the forecast period. The segment is primarily driven by the growing target recognition and positioning elements as these systems are AI-driven, allowing for greater engagement efficiency with little human intervention. Autonomous warfare is ever-increasing in demand, therefore pushing greater acceptance of this system in the arms of defense all over the world. The integration of technologies such

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as AI-assisted target recognition, swarm coordination, and extended loitering capabilities can shape evolving strategies in modern warfare. On top of that, loitering munitions are being explored by defense agencies for asymmetrical warfare scenarios instead of conventional missiles. The network-centric war-fighting environment coupled with real-time data-sharing capability helps to boost the operational effectiveness of these systems. Furthermore, manufacturers operating in the sector are considering new developments such as endurance, with modular payload capacities and assumed low radar cross-section for survivability in contested environments. As a result, loitering munition development is fueled by the need for electronic warfare (EW) countermeasures and improved integration on the battlefield with existing combat systems. Therefore, autonomous systems for loitering munitions are forecasted to witness an immense boom.

Based on range, the loitering munition market is segmented into Short-Range, Medium-Range, and Long-Range. The short-range segment continues to dominate the loitering munitions market due to its compact design, affordability, and tactical flexibility. Extensively, these systems are valued for their close-air support, urban operations, and counter-insurgency missions in which time-critical deployment and precision strikes mean everything. Their lightweight form and ease of operation make it practically possible for ground forces to engage hostile targets with minimum logistical overhead within modern warfare situations. Additionally, short-range loitering munitions can be put to effective use for reconnaissance and surveillance missions since they can be seen in action giving real-time intelligence before hitting enemy positions. Such requirements have turned up demands for precision attack systems operated by troops as decentralized entities, and all of these munitions are constantly evolving, whether for advanced target recognition, AI-guided munitions, or loitering for longer periods. Innovations in battery efficiency, payload miniaturization, and secure communication networks will also support short-range loitering munitions significantly. The growing demand for cost-efficient ways to optimize operations under low-intensity conflict and special operations will add value to the market. In addition with current global efforts of military forces to arm themselves with enhanced asymmetric warfare capabilities, there would be no end to the demand of short-range loitering munitions in future and that would keep them reigning strong in the market. For instance, in 2024, Thales developed a revolutionary loitering munition product specially designed for high-intensity operations called TOUTATIS. In its short-range variant, TOUTATIS offers a range of 10 km and a 45 min endurance. It boasts a state-of-

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the-art warhead capable of neutralizing light armored vehicles. The system can be operated in GPS-denied environments with disrupted communications. TOUTATIS offers interoperability with Thales ISR drones Spy'Ranger, Noctua, and Grizzly for coordinated operations.

Based on platforms, the loitering munition market is segmented into Land/Ground, Air, and Naval. The Land/Ground segment remains the top segment in the loitering munition market due to the increasing demand for precision-strike capabilities in modern ground warfare. During incursions, the infantry and elite forces often depend on armored divisions for additional attack equations, hence renewed calls for less costly, more flexible mobile attack options have now included loitering munitions into this weaponry. These munitions will support ground forces with information on real-time reconnaissance, target tracking, and strikes to lessen collateral effects while improving efficiency during operations. The continuing dynamic of asymmetric engagements and counter-insurgency operations makes loitering munitions relevant to land combat. Military forces across the globe are investing in higher-end ground-based loitering munitions integrated with artificial intelligence, better warhead effectiveness, and more endurance for use in high-competition environments, where speed and precision are becoming critical in deployment and targeting. Additionally, advances in portability, stealth, and battlefield networking further increase the capabilities of loitering artillery in the land dimension. The shift to network-centric warfare and increase in real-time target identification and autonomous attack capability, continue to be engines of market growth. As the country’s defense forces place emphasis on maneuverable, rapidly deployable systems for strikes, demand for ground-based loitering munitions will remain firm and further strengthen their dominance in the competitive arena.

For a better understanding of the market of the loitering munition market, the market is analyzed based on its worldwide presence in countries such as North America (The US, Canada, and Rest of North America), Europe (Germany, The UK, France, Italy, Spain, Rest of Europe), Asia-Pacific (China, Japan, India, Rest of Asia-Pacific), Rest of World. The North American region remains the largest market for loitering munitions due to several factors such as the advanced defense industry, substantial military budget, and increasing adoption of autonomous weaponry. Funds supported by the U.S. defense establishment are aimed at furthering precise strikes and making the battlefield more efficient. For instance, in October 2024, AeroVironment (US) was awarded a delivery

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order worth USD 54.9 million by the U.S. Army to produce the Switchblade loitering munition systems, which represents an initial ordering under a larger indefinite-delivery/indefinite-quantity (IDIQ) contract that withholds an additional ceiling of USD 743 million. Northrop Grumman and Lockheed Martin are also engaged in developing advanced loitering munitions with AI-guided targeting and extended operational range, increasing their revenues in this defense segment. Faster demand for these weapons due to the Ukraine-Russian War aided by heavy supplies from America to Ukraine, thereby enhancing their utility on the battlefield. The loitering munitions program remains essential for the U.S. Army's Long Range Precision Fires (LRPF), keeping its market ahead in the race. Similar collaborations among the concerned defense firms and government agencies have lent themselves to innovation, as exemplified by DARPA's looming investments in swarm-capable next-generation loitering munitions. For example, in June 2023, UVision USA, the U.S. subsidiary of UVision Air, a global leader in aerial loitering systems, announced the successful launch of its Hero 120 loitering munition systems from an airborne helicopter in partnership with Axxeum, a full-service aviation integration facility.

Some of the major players operating in the market include AeroVironment, Inc., WB Group, Elbit Systems Ltd., Aerospace CH UAV Co, Thales, Rheinmetall AG, Israel Aerospace Industries, Uvision, AEVEX Aerospace, and Teledyne FLIR LLC.

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