

# Man-Portable Air-Defense System (MANPADS) Market: Current Analysis and Forecast (2025-2033)

<https://marketpublishers.com/r/M8103A3162ABEN.html>

Date: October 2025

Pages: 138

Price: US\$ 3,999.00 (Single User License)

ID: M8103A3162ABEN

## Abstracts

MANPADS are short-range, lightweight, and portable surface-to-air missiles that can be fired by individuals or small groups to destroy aircraft or helicopters. They help shield troops from aerial attacks and are most effective in targeting low-flying aircrafts.

MANPATs or Man-Portable Anti-Tank Systems work in a similar manner but are used to destroy or incapacitate military tanks. MANPADS have a maximum range of 8 kilometers and can engage targets at altitudes of 4.5 km. The first MANPADS were introduced by the United States and the Soviet Union in the 1960s.

The Man-Portable Air-Defense System (MANPADS) market is set to show a growth rate of about 6.62% during the forecast period (2025-2033F). The Man-Portable Air-Defense System (MANPADS) market around the world is experiencing steady growth because of the growth in defense budgets, modernization, and threats of low-flying aircraft, helicopters, and unmanned aerial vehicles (UAVs). MANPADS are lightweight, shoulder-fired surface-to-air systems, which are aimed at delivering air defense to the ground troops at a minimal cost and in a mobile manner. They are important in tactical defense operations due to their portability, the ease with which they can be deployed, and they are very precise. The presence of geopolitical tensions, regional conflicts, and asymmetric warfare has forced countries to increase their air defense budget, which has resulted in increased sales of MANPADS by developed and emerging economies. Other technological improvements, such as improved target-tracking systems, infrared seekers, and advanced guidance technologies, are also driving the development of next-generation systems.

Based on the guidance system category, the market is categorised into command-to-line-of-sight, infrared homing, radar homing, and others. Among these, the infrared homing segment currently holds the largest market share in

the MANPADS market because of its high accuracy, passive mode, and the ease of deployment without any external guidance systems. This is because they have better target-tracking capabilities compared to the aircraft and drones, and they are good both in defensive and offensive missions. However, the Command-to-Line-of-Sight (CLOS) segment is set to grow significantly with improvements in real-time data connection, optical tracking, and digital fire-control systems that increase the accuracy and resiliency to countermeasures, facilitating the modernization of next-generation air-defense systems.

Based on the range category, the market is categorized into short range (up to 5 km), medium range (5-10 km), and long range (over 10 km). Among these, short-range currently hold the maximum market share because the majority of the portable air-defense systems are intended to be deployed in close-range interception of low-flying aircraft, helicopters, and drones. Their small sizes, lightweight construction, and mobility make them suitable for deployment at high speeds by the ground troops. For instance, in September 2025, Serbia unveiled the "MTU-4M quad MANPADS launcher", mounted on the Hajduk 4x4 at PARTNER 2025, showcasing a mobile, networked short-range air-defense solution that integrates sensors, datalinks, and vehicle-level processing. The system carries four infrared-homing missiles and leverages existing missile stocks to give maneuver units rapid, pragmatic low-altitude air-defense capability. However, the growth rate of the medium-range segment is expected to accelerate in the future due to innovations in propulsion, seeker technology, and guidance systems, which will allow the forces to extend the engagement range and be portable at the same time to be able to counter more sophisticated aerial threats.

Based on the application category, the market is segmented into military and homeland security. Among these, the military segment holds the largest market share because MANPADS systems are mainly used by military forces to provide air cover on the battlefield to attack airplanes, helicopters, and drone aircraft operated by the enemy. Their widespread use in military systems around the world is necessitated by the high cost of defense budgets, modernizations, and the demand to have mobile and fast response systems. However, in the future, the homeland security segment is expected to grow with the fastest CAGR, as more and more issues emerge regarding the problem of terrorism, trans-border threats, and rogue drone attacks. The security forces are also being gradually armed by the governments through portable air-defense systems to improve national protection and critical infrastructure defense capabilities.

For instance, in July 2024, MBDA unveiled a new man-portable VSHORAD (Very Short Range Air Defence) system at the Farnborough International Airshow 2024, designed for the Italian Army and export markets, featuring a supersonic, fire-and-forget missile with an advanced seeker capable of engaging fighters, helicopters, and small drones either man-portable or vehicle-mounted.

For a better understanding of the demand of Man-Portable Air-Defense System (MANPADS), the market is analyzed based on its worldwide adoption in countries such as North America (U.S., Canada, and the Rest of North America), Europe (Germany, U.K., France, Spain, Italy, Rest of Europe), Asia-Pacific (China, Japan, India, and the Rest of Asia-Pacific), and Rest of World. Among these, North America holds the largest market share. This dominance is driven by the constant investor activities in the development of superior air defense systems. However, the Asia-Pacific (APAC) region is expected to witness significant growth due to the escalating geopolitical tensions, particularly in areas like the South China Sea and the India-Pakistan border, which necessitate enhanced air defense capabilities.

Some major players running in the market include MBDA, RTX Corporation, Thales, Saab AB, Bharat Dynamics Limited, Lockheed Martin Corporation, Leonardo S.p.A., Roketsan, LIG Nex1 Co. Ltd., and Mesko S.A.

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