Weapons Carriage And Release Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 110 pages | Mordor Intelligence

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Report description:

The Weapons Carriage And Release Systems Market size is estimated at USD 409.12 million in 2024, and is expected to reach USD 502.40 million by 2029, growing at a CAGR of 4.19% during the forecast period (2024-2029).

The emergence of new technologies and platforms has transformed the warfare strategies of nations such as the US, Russia, and China. These countries have diverted their efforts towards the development of sophisticated and powerful weapons that can severely impact enemy strongholds and help attain a tactical advantage in case of an armed standoff. While weapon carriages are being redesigned for specific weaponry, release systems are being used extensively in current warfare scenarios due to their visual superiority and capability of performing pre-emptive strikes on specific locations.

However, the market may be deterred by the design challenges faced by system integrators to incorporate advanced features in their product portfolio without compromising on the payload capacity, aerodynamic profile, and range of a delivery platform. Designers are also required to ensure the availability of sophisticated integrated features and cross-compatibility with the different types of advanced weapon systems from several weapon manufacturers to develop a fully operational weapon carriage and release system, hence rendering a complex outlook to the overall system design.

Furthermore, the growth in the market for weapons transport and release systems is also driven by growing government regulations on border monitoring and the security of citizens against terrorism.

Weapons Carriage and Release System Market Trends

Aircraft Platform to Dominate the Market

Several fleet modernization programs are underway globally in 2023. However, the aircraft fleet expansion and modernization programs contributed to a majority share of such undertaken initiatives due to their high induction rate and relatively higher pricing justified by their inherent sophisticated flight characteristics. The demand for weapon carriage and release systems is directly proportional to the rate of procurement of new combat aerial assets and the modernization of existing ones to increase their lethality. For instance, the Indian Ministry of Defence plans to acquire aircraft to cope with the depleting inventories of the Indian Air Force (IAF). As per the orders, the Indian Air Force will have 40 LCA Tejas fighter jets, 180 LCA Tejas Mark-1A fighter jets, and at least 200 Tejas Mark-2 jets by 2038. Besides, with new missiles being compatible with several aircraft programs, the weapons carriage and release systems are required to be designed accordingly. Such design features drive the growth prospects of the aircraft platform of the market in focus during the forecast period.

North America Dominates the Market in 2019

North America is estimated to account for the largest share of the weapons carriage and release systems market in 2023. The US has one of the most advanced fleets of aerial combat platforms at its disposal and is currently focusing on upgrading its existing fleets. Moreover, the country is a key exporter and consumer of such equipment globally, as it is home to some of the leading suppliers and integrators of weapons carriage and release systems. Between 2023 and 2022, the US enhanced its share of total arms exports from USD 7.5 billion to USD 14.5 billion. With potential adversaries such as Israel, Russia, and China fielding an increasingly diverse, expansive, and modern range of regional offensive missile systems that can threaten the aerial assets of the US forces, its allies, and partners, the US-based defence contractors are actively expanding and modernizing the capabilities of their aerial assets, thereby driving the demand for weapons carriage and release systems. The US indigenously developed the F-22, but due to certain limitations with designing a naval variant, the F-35 program was initiated. The biggest physical difference in the capabilities between the F-22 and the F-35 is their weapon bays. The weapon bay on the F-35 is deeper and narrower than that of the F-22 to carry heavier bombs meant for air-to-ground combat. As of June 2023, nearly 950 F-35s have been manufactured. The aircraft is expected to eventually replace a large number of US jet fighters such as F-16, F/A-18, A-10, F-117, and the Harrier. The F-35 aircraft has two internal weapons bays with two weapons stations each. The aircraft can use six external weapons stations for non-stealthy missions.

Weapons Carriage and Release System Industry Overview

The weapons carriage and release systems are consolidated due to the presence of a few major players. The prominent players in the carriage of the weapons and release systems market are Cobham Limited, RTX Corporation, L3Harris Technologies, Inc., Moog Inc., and The Marvin Group. Vendors are implementing marginal design changes to their offerings to accommodate newer variants of integrated weapons payload. Long-term collaborations are preferred in the market; hence, the threat of entry of a new market player is minimal. For instance, in April 2021, Kratos Defense & Security Solutions, Inc., in partnership with Kratos Unmanned Systems Division and Area-I, successfully tested the XQ-58A Valkyrie's sixth test/demonstration flight and the first release from its internal weapons bay. The test demonstrated the ability to launch a small, unmanned UAS system from the internal weapons bay. Kratos, Area-I, and AFRL developed software and designed and fabricated the SUAS carriage to enable the successful release of the unmanned UAS system.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
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