

Ammunition Market by Application (Defense, Civil & Commercial), Caliber (Small, Medium, Large), Product (Bullets, Aerial Bombs, Artillery Shells, Mortars), Component, Guidance Mechanism, Lethality (Lethal, Less-lethal), and Region -Global Forecast to 2028

Market Report | 2024-04-12 | 382 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The global ammunition market size is projected to grow from USD 28.0 billion in 2023 to USD 33.1 billion in 2028, at a CAGR of 3.4% from 2023 to 2028. Factors such as the modernization of armed forces, the militarization of police forces, changing nature of warfare, the increasing incidence of drug trafficking, and terrorist activities are the driving factors in the ammunition market. However factors like varying regulations affecting procurement of ammunition and civilian disarmament initiatives are acting as restraints on the market

"Medium-Caliber segment to grow at highest CAGR during the forecast period."

Medium-caliber ammunition is poised to experience the highest growth rate during the forecast period due to several key factors. Firstly, there is an increasing demand for versatile ammunition that can effectively engage targets across various combat scenarios, ranging from infantry engagements to light vehicle suppression. Medium-caliber rounds offer a balance between firepower, range, and portability, making them suitable for a wide range of applications. Moreover, the growing emphasis on urban warfare and counterinsurgency operations necessitates ammunition that can provide effective suppression while minimizing collateral damage, a requirement that medium-caliber rounds are well-suited to fulfill

"By Product, bullets in the ammunition market segment will grow at highest CAGR."

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The bullets segment is projected to grow at the highest CAGR. The growth of this segment can be attributed to the high demand from infantry soldiers, homeland security personnel, and civilians. Bullets represent a fundamental and essential component of firearm ammunition. As the primary projectile expelled from firearms, bullets are indispensable in military, law enforcement, sports and hunting activities, and civilian shooting applications.

"By Application, the fastest-growing segment of the ammunition market is Defense. "

The Defense segment of the ammunition market is poised for the highest growth rate due to several converging factors. Firstly, geopolitical tensions and escalating security threats around the globe are compelling nations to bolster their defense capabilities, leading to increased procurement of ammunition for military forces. Additionally, the proliferation of asymmetric warfare, terrorism, and insurgency activities necessitates continuous modernization and enhancement of defense arsenals, driving sustained demand for ammunition across various calibers and types. Moreover, advancements in military technology, such as the development of precision-guided munitions and smart ammunition, are driving investments in next-generation ammunition solutions, further propelling the growth of the Defense segment.

"Asia Pacific is the largest contributing region in the ammunition market."

The ammunition market in the Asia Pacific region has been studied for the China, India, Japan, South Korea, Australia, Singapore, Indonesia, and Vietnam. One of the major factors fueling the growth of the ammunition market in Asia Pacific is ongoing military modernization programs in India and China. The increasing incidences of territorial and armed conflicts in the Asia Pacific region have led major economies to adopt strong measures to protect their land as well as the population.

The break-up of the profile of primary participants in the ammunition market:

- By Company Type: Tier 1 - 35%, Tier 2 - 45%, and Tier 3 - 20%
- By Designation: C Level - 35%, Director Level - 25%, and Others - 40%
- By Region: North America - 20%, Europe - 5%, Asia Pacific - 45%, and Middle East & Africa - 30%

Major companies profiled in the report include General Dynamics Corporation (US), Northrop Grumman Corporation (US), BAE Systems (UK), Thales (France), Nammo AS (Norway), Elbit Systems Ltd. (Israel), Olin Corporation (US), Rheinmetall AG (Germany), and Ammo Inc. (US) among others. (26 Companies)

Research Coverage:

This research report covers the ammunition market across various segments and subsegments. It aims at estimating the size and growth of the market across different segments and region. The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the ammunition market. A detailed analysis of the key industry players has been done to provide insights into their business overviews; solutions and services; key strategies; new product launches; mergers; and partnerships, agreements, associated with the ammunition market.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall ammunition market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of Key Drivers (Geopolitical tensions and territorial conflicts across the globe, Growth in military expenditure across the countries, Change in nature of warfare, Modernization programs undertaken by military forces, Militarization of police forces, Rise in drug trafficking globally) Restraints (Varying regulation affecting the procurement of ammunition, Civilian Disarmament

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

initiatives), Opportunities (Advancements in small-caliber ammunition, Stockpiling of ammunition, Reduction in weight of ammunition) Challenges (Proliferation of illicit ammunition manufacturers, International measures to control use of ammunition).

-□Market Penetration: Comprehensive information on ammunition offered by the top players in the market

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the ammunition market

-□Market Development: Comprehensive information about lucrative markets - the report analyzes the ammunition market across varied regions

-□Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the ammunition market

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the ammunition market

Table of Contents:

1□INTRODUCTION□	61
1.1□STUDY OBJECTIVES□	61
1.2□MARKET DEFINITION□	61
1.3□STUDY SCOPE□	62
1.3.1□AMMUNITION: MARKET SEGMENTATION□	62
1.3.2□REGIONAL SCOPE□	63
1.3.3□YEARS CONSIDERED□	63
1.4□INCLUSIONS AND EXCLUSIONS□	64
TABLE 1□INCLUSIONS AND EXCLUSIONS IN AMMUNITION MARKET□	64
1.5□CURRENCY CONSIDERED□	65
1.6□LIMITATIONS□	65
1.7□MARKET STAKEHOLDERS□	66
1.8□SUMMARY OF CHANGES□	66
2□RESEARCH METHODOLOGY□	67
2.1□RESEARCH DATA□	67
FIGURE 1□RESEARCH FLOW□	67
FIGURE 2□AMMUNITION MARKET: RESEARCH DESIGN□	68
2.1.1□SECONDARY DATA□	68
2.1.1.1□Key data from secondary sources□	69
FIGURE 3□KEY DATA FROM SECONDARY SOURCES□	69
2.1.2□PRIMARY DATA□	69
2.1.2.1□Key data from primary sources□	69
2.2□MARKET SIZE ESTIMATION□	70
2.3□RESEARCH APPROACH & METHODOLOGY□	70
2.3.1□BOTTOM-UP APPROACH□	70
2.3.1.1□Ammunition market for military□	71
2.3.1.2□Ammunition market for homeland security□	71
2.3.1.3□Ammunition market for civil & commercial□	71
2.3.1.4□Ammunition market size, by segment□	71

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FIGURE 4	MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH	71
2.3.2	TOP-DOWN APPROACH	72
FIGURE 5	MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH	72
2.4	MARKET BREAKDOWN & DATA TRIANGULATION	73
FIGURE 6	DATA TRIANGULATION	73
2.5	RESEARCH ASSUMPTIONS	74
2.6	RECESSION IMPACT ANALYSIS	74
2.7	RESEARCH LIMITATIONS	75
2.8	RUSSIA-UKRAINE WAR IMPACT ANALYSIS	75
2.8.1	IMPACT OF RUSSIA'S INVASION OF UKRAINE ON DEFENSE INDUSTRY'S MACRO FACTORS	75
FIGURE 7	IMPACT OF RUSSIA'S INVASION OF UKRAINE ON DEFENSE INDUSTRY'S MACRO FACTORS	76
2.8.1.1	Impact of Russia-Ukraine war on micro factors of defense market	77
2.8.1.2	Impact of Russia-Ukraine war on micro factors of ammunition market	78
FIGURE 8	IMPACT OF RUSSIA-UKRAINE WAR ON MICRO FACTORS OF AMMUNITION MARKET	79
2.9	RISK ASSESSMENT	79
3	EXECUTIVE SUMMARY	80
FIGURE 9	DEFENSE SEGMENT TO LEAD AMMUNITION MARKET DURING FORECAST PERIOD	80
FIGURE 10	SMALL-CALIBER SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	81
FIGURE 11	BULLETS SEGMENT TO LEAD AMMUNITION MARKET DURING FORECAST PERIOD	81
FIGURE 12	PROJECTILES & WARHEADS SEGMENT TO LEAD AMMUNITION MARKET DURING FORECAST PERIOD	82
FIGURE 13	MARKET IN ASIA PACIFIC TO ACCOUNT FOR LARGEST SHARE DURING FORECAST PERIOD	83
4	PREMIUM INSIGHTS	84
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN AMMUNITION MARKET	84
FIGURE 14	INCREASE IN NUMBER OF ARMED CONFLICTS AND DEMAND FOR ARMED FORCES MODERNIZATION PROGRAMS TO FUEL MARKET GROWTH	84
4.2	AMMUNITION MARKET, BY APPLICATION	84
FIGURE 15	DEFENSE SEGMENT RECORDED HIGHEST MARKET SHARE IN 2023	84
4.3	AMMUNITION MARKET, BY CALIBER	85
FIGURE 16	MEDIUM-CALIBER TO WITNESS HIGHEST CAGR DURING FORECAST PERIOD	85
4.4	AMMUNITION MARKET, BY PRODUCT	85
FIGURE 17	BULLETS SEGMENT TO ACCOUNT FOR HIGHEST MARKET SHARE DURING FORECAST PERIOD	85
4.5	AMMUNITION MARKET, BY COMPONENT	86
FIGURE 18	PROJECTILE & WARHEAD COMPONENT SEGMENT TO HOLD HIGHEST MARKET SHARE DURING FORECAST PERIOD	86
4.6	AMMUNITION MARKET, BY GUIDANCE	86
FIGURE 19	NON-GUIDED SEGMENT TO WITNESS HIGHER MARKET SHARE DURING FORECAST PERIOD	86
4.7	AMMUNITION MARKET, BY LETHALITY	87
FIGURE 20	LETHAL SEGMENT TO HOLD HIGHER MARKET SHARE DURING FORECAST PERIOD	87
4.8	AMMUNITION MARKET, BY COUNTRY	87
FIGURE 21	RUSSIA TO BE FASTEST-GROWING MARKET DURING FORECAST PERIOD	87
5	MARKET OVERVIEW	88
5.1	INTRODUCTION	88
5.2	MARKET DYNAMICS	88
FIGURE 22	DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN AMMUNITION MARKET	88
5.2.1	DRIVERS	89
5.2.1.1	Geopolitical tensions and territorial conflicts across globe	89
TABLE 2	GLOBAL TERRORISM INDEX, BY COUNTRY, 2022	89
5.2.1.2	Growth in military expenditure and arms transfer across countries	90

FIGURE 23	MILITARY EXPENDITURE OF TOP COUNTRIES, 2022	90
FIGURE 24	SHARE OF TOP 10 MAJOR ARMS EXPORTERS, 2018-2022	91
5.2.1.3	Change in nature of warfare	91
5.2.1.4	Modernization programs undertaken by military forces	92
5.2.1.5	Militarization of police forces	92
5.2.1.6	Rise in drug trafficking globally	92
5.2.2	RESTRAINTS	93
5.2.2.1	Varying regulations affecting procurement of ammunition	93
5.2.2.2	Civilian disarmament initiatives	93
5.2.3	OPPORTUNITIES	93
5.2.3.1	Advancements in small-caliber ammunition	93
TABLE 3	RECENT DEVELOPMENTS IN ADVANCED AMMUNITION	94
5.2.3.2	Stockpiling of ammunition	94
5.2.3.3	Reduction in weight of ammunition	95
5.2.4	CHALLENGES	95
5.2.4.1	Proliferation of illicit ammunition manufacturers	95
5.2.4.2	International measures to control use of ammunition	96
5.3	AMMUNITION MARKET ECOSYSTEM	96
5.3.1	PROMINENT COMPANIES	96
5.3.2	PRIVATE AND SMALL ENTERPRISES	96
5.3.3	END USERS	96
FIGURE 25	ECOSYSTEM MAP: AMMUNITION MARKET	97
TABLE 4	AMMUNITION: MARKET ECOSYSTEM	97
5.4	TECHNOLOGY ANALYSIS	98
5.4.1	KEY TECHNOLOGIES	98
5.4.1.1	Self-steering Bullet	98
5.4.1.2	Caseless Telescoped Ammunition (CTA)	98
5.4.1.3	Polymer-cased Ammunition	99
TABLE 5	CONVENTIONAL BRASS-CASED AMMUNITION VS. EMERGENT CARTRIDGE CASE TECHNOLOGIES	99
5.4.1.4	Lightweight Ammunition	99
TABLE 6	WEIGHT DISTRIBUTION: 7.62 X 51 MM CARTRIDGE	100
5.4.1.5	Advanced Propellants	100
5.4.2	COMPLIMENTARY TECHNOLOGIES	100
5.4.2.1	Precision-Guided Munition (PGM)	100
5.4.2.2	Multipurpose Munition	101
5.4.2.2.1	Loitering munitions	101
5.5	OPERATIONAL DATA	102
5.5.1	SOLDIER HEADCOUNT BY MAJOR COUNTRIES, 2018-2020	102
TABLE 7	SOLDIER HEADCOUNT, BY COUNTRY, 2018-2020	102
5.5.2	KEY CALIBERS USED BY MAJOR COUNTRIES, 2023	102
TABLE 8	KEY CALIBER, BY COUNTRY, 2023	102
5.5.3	KEY FIREARMS USED BY MAJOR COUNTRIES, 2023	104
TABLE 9	KEY FIREARM, BY COUNTRY, 2023	104
5.6	CASE STUDY ANALYSIS	106
5.6.1	EXTENDED RANGE ARTILLERY SHELLS	106
5.6.2	DEVELOPMENT OF HIGH-POWER ANTI-TANK SHELLS	107
5.7	TRENDS/DISRUPTIONS IMPACTING CUSTOMER'S BUSINESS	107

5.7.1	REVENUE SHIFT AND NEW REVENUE POCKETS FOR AMMUNITION MANUFACTURERS	107
	FIGURE 26	REVENUE SHIFT IN AMMUNITION MARKET
5.8	KEY STAKEHOLDERS & BUYING CRITERIA	108
5.8.1	KEY STAKEHOLDERS IN BUYING PROCESS	108
	FIGURE 27	INFLUENCE OF STAKEHOLDERS ON BUYING AMMUNITION FOR TWO APPLICATIONS
	TABLE 10	INFLUENCE OF STAKEHOLDERS ON BUYING AMMUNITION FOR TWO APPLICATIONS (%)
5.8.2	BUYING CRITERIA	108
	FIGURE 28	KEY BUYING CRITERIA OF AMMUNITION FOR TOP TWO APPLICATIONS
	TABLE 11	KEY BUYING CRITERIA OF AMMUNITION FOR TOP TWO APPLICATIONS
5.9	VALUE CHAIN ANALYSIS	109
	FIGURE 29	VALUE CHAIN ANALYSIS: AMMUNITION MARKET
5.9.1	AMMUNITION PRODUCTION PROCESS	110
	FIGURE 30	SMALL-CALIBER AMMUNITION PRODUCTION PROCESS
5.9.1.1	Packaging and marking of small-caliber ammunition	110
5.9.1.2	Trends in packaging and marking ammunition	110
5.9.1.2.1	Laser engraving	110
5.9.1.2.2	RFID tags	111
5.9.1.2.3	Electronic chip strips	111
5.10	PRICING ANALYSIS	112
	FIGURE 31	AVERAGE SELLING PRICE OF SMALL, MEDIUM, AND LARGE-CALIBER AMMUNITION, BY APPLICATION
5.10.1	AVERAGE SELLING PRICE OF SMALL-CALIBER AMMUNITION	112
	TABLE 12	AVERAGE SELLING PRICE OF SMALL-CALIBER AMMUNITION, 2022 (USD)
5.10.2	AVERAGE SELLING PRICE OF MEDIUM-CALIBER AMMUNITION	113
	TABLE 13	AVERAGE SELLING PRICE OF MEDIUM-CALIBER AMMUNITION, 2022 (USD)
5.11	BILL OF MATERIALS (BOM) FOR 155 MM HIGH EXPLOSIVE SHELLS	113
	FIGURE 32	BILL OF MATERIALS FOR 155 MM HIGH EXPLOSIVE SHELLS IN 2023
5.12	TOTAL COST OF OWNERSHIP OF 155 MM HIGH EXPLOSIVE SHELLS	114
	FIGURE 33	TOTAL COST OF OWNERSHIP OF HIGH EXPLOSIVE 155 MM SHELLS
	TABLE 14	TOTAL COST OF OWNERSHIP OF 155 MM HIGH EXPLOSIVE SHELLS
5.13	AMMUNITION MARKET BUSINESS MODEL OF 5 KEY PLAYERS	115
	FIGURE 34	AMMUNITION MARKET: BUSINESS MODEL OF 5 KEY PLAYERS
5.14	TRADE DATA ANALYSIS	115
5.14.1	IMPORT SCENARIO	115
	FIGURE 35	IMPORT DATA FOR TOP 10 COUNTRIES FOR HS CODE 93
5.14.2	EXPORT SCENARIO	116
	FIGURE 36	EXPORT DATA OF TOP 10 COUNTRIES FOR HS CODE 93
5.15	TARIFF AND REGULATORY LANDSCAPE	116
5.15.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	116
	TABLE 15	NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
	TABLE 16	EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
	TABLE 17	ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
	TABLE 18	MIDDLE EAST: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
	TABLE 19	LATIN AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
5.16	KEY CONFERENCES & EVENTS, 2024-2025	119
	TABLE 20	AMMUNITION MARKET: DETAILED LIST OF CONFERENCES & EVENTS
6	INDUSTRY TRENDS	120
6.1	INTRODUCTION	120

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.2	TECHNOLOGY TRENDS	120
6.2.1	ADDITIVE MANUFACTURING	120
6.2.2	OPTICALLY INITIATED AMMUNITION	121
6.2.3	RADICALLY INVASIVE PROJECTILE (RIP) AMMUNITION	121
6.3	ADVANCEMENTS IN AMMUNITION TECHNOLOGY	121
6.3.1	CARTRIDGE-BASED AMMUNITION	121
6.3.1.1	Laser-initiated ammunition	121
6.3.1.2	One-way luminescence (OWL) projectiles	122
6.3.1.3	Pre-fragmented ammunition	122
6.3.1.4	General-purpose caliber	122
6.3.1.5	Green ammunition	122
6.3.1.6	Cased telescoped (CT) ammunition	122
6.3.1.7	Polymer cartridge cases	122
6.3.1.8	Caseless ammunition	123
6.3.1.9	Self-guided smart bullets	123
6.3.1.10	Biodegradable plant-growing bullets	123
6.3.2	SMART WEAPON AMMUNITION	123
6.3.2.1	Precision inertial navigation systems (PINS)	123
6.3.2.2	Micro inertial navigation technology	124
6.3.2.3	Extreme accuracy tasked ordnance	124
6.3.2.4	Inertial measurement units	124
6.4	INNOVATION & PATENT REGISTRATIONS	125
FIGURE 37	NUMBER OF PATENTS GRANTED FOR AMMUNITION MARKET, 2014-2022	125
TABLE 21	IMPORTANT INNOVATIONS & PATENT REGISTRATIONS, 2010-2022	125
6.5	TECHNOLOGY ROADMAP	127
FIGURE 38	INTRODUCTION TO TECHNOLOGY ROADMAP	127
FIGURE 39	EVOLUTION OF KEY TECHNOLOGY	127
FIGURE 40	EMERGING TREND RELATED TO AMMUNITION MARKET	128
7	AMMUNITION MARKET, BY APPLICATION	129
7.1	INTRODUCTION	130
FIGURE 41	DEFENSE SEGMENT IS PROJECTED TO LEAD AMMUNITION MARKET FROM 2023 TO 2028	130
TABLE 22	AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION)	130
TABLE 23	AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	131
7.2	DEFENSE	131
TABLE 24	AMMUNITION MARKET, BY DEFENSE, 2020-2022 (USD MILLION)	131
TABLE 25	AMMUNITION MARKET, BY DEFENSE, 2023-2028 (USD MILLION)	131
7.2.1	MILITARY	131
7.2.1.1	Rising intensity of global conflicts to drive market	131
7.2.2	HOMELAND SECURITY	132
7.2.2.1	Rise of unconventional threats to drive market	132
7.3	CIVIL & COMMERCIAL	132
TABLE 26	AMMUNITION MARKET, BY CIVIL & COMMERCIAL APPLICATION, 2020-2022 (USD MILLION)	132
TABLE 27	AMMUNITION MARKET BY CIVIL & COMMERCIAL APPLICATION, 2023-2028 (USD MILLION)	133
7.3.1	SPORTING	133
7.3.1.1	Increasing demand for firearms and airguns to drive market	133
7.3.2	HUNTING	133
7.3.2.1	Increasing demand for precision in hunting activities to drive market	133

7.3.3	SELF-DEFENSE	133
7.3.3.1	Growing concern for personal safety to drive market	133
7.3.4	OTHER CIVIL & COMMERCIAL APPLICATIONS	134
8	AMMUNITION MARKET, BY CALIBER	135
8.1	INTRODUCTION	136
FIGURE 42	MEDIUM-CALIBER AMMUNITION SEGMENT IS PROJECTED TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	136
TABLE 28	AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION)	136
TABLE 29	AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION)	136
8.2	SMALL-CALIBER AMMUNITION	137
8.2.1	MODERNIZATION OF ARMED FORCES TO DRIVE MARKET	137
TABLE 30	AMMUNITION MARKET, BY SMALL CALIBER, 2020-2022 (USD MILLION)	137
TABLE 31	AMMUNITION MARKET, BY SMALL CALIBER, 2023-2028 (USD MILLION)	137
8.2.2	9X19 MM PARABELLUM	138
8.2.2.1	Low cost and easy availability to drive market	138
8.2.3	5.56 MM	138
8.2.3.1	Increasing use of military and civilian firearms to drive market	138
8.2.4	7.62 MM	138
8.2.4.1	Rise in procurement from defense forces to drive market	138
8.2.5	338 LAPUA MAGNUM	139
8.2.5.1	Increasing adoption by special forces to drive market	139
8.2.6	338 NORMA MAGNUM	139
8.2.6.1	Increasing adoption by US and Israel armed forces to drive market	139
8.2.7	12.7 MM	139
8.2.7.1	High stopping power, versatility, and widespread adoption to drive market	139
8.2.8	14.5 MM	140
8.2.8.1	Increasing demand in remote weapon stations of naval vessels, aircraft, and armored vehicles to drive market	140
8.2.9	OTHER SMALL-CALIBER AMMUNITION	140
8.3	MEDIUM-CALIBER AMMUNITION	140
8.3.1	RISING DEMAND FROM MILITARY AND LAW ENFORCEMENT TO DRIVE MARKET	140
TABLE 32	AMMUNITION MARKET, BY MEDIUM CALIBER, 2020-2022 (USD MILLION)	140
TABLE 33	AMMUNITION MARKET BY MEDIUM CALIBER, 2023-2028 (USD MILLION)	141
8.3.2	20 MM	141
8.3.2.1	Increasing use in counter-rocket, artillery, and mortar (C-RAM) weapon systems to drive market	141
8.3.3	25 MM	141
8.3.3.1	Increasing use in infantry fighting vehicles to drive market	141
8.3.4	30 MM	141
8.3.4.1	High usage in attack helicopters to drive demand	141
8.3.5	40 MM	142
8.3.5.1	Technological advancements and superior properties to drive market	142
8.4	LARGE-CALIBER AMMUNITION	142
8.4.1	SURGE IN DEMAND DUE TO INCREASED GEO-POLITICAL INSTABILITY TO DRIVE MARKET	142
TABLE 34	AMMUNITION MARKET, BY LARGE CALIBER, 2020-2022 (USD MILLION)	142
TABLE 35	AMMUNITION MARKET BY LARGE CALIBER, 2023-2028 (USD MILLION)	143
8.4.2	60 MM	143
8.4.2.1	Increasing use of mortars to drive market	143
8.4.3	81 MM	143
8.4.3.1	Need for long-range bombardment to drive market	143

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

8.4.4	120 MM	143
8.4.4.1	Need for robust armored capabilities to drive market	143
8.4.5	155 MM	144
8.4.5.1	Use in long-range artillery applications to drive market	144
8.4.6	OTHER LARGE-CALIBER AMMUNITION	144
8.5	OTHERS	144
9	AMMUNITION MARKET, BY PRODUCT	145
9.1	INTRODUCTION	146
FIGURE 43	ARTILLERY SHELLS TO ACCOUNT FOR HIGHEST MARKET SHARE DURING FORECAST PERIOD	146
TABLE 36	AMMUNITION MARKET, BY PRODUCT, 2020-2022 (USD MILLION)	146
TABLE 37	AMMUNITION MARKET, BY PRODUCT, 2023-2028 (USD MILLION)	146
9.2	BULLETS	147
9.2.1	HIGH DEMAND FROM INFANTRY SOLDIERS, HOMELAND SECURITY PERSONNEL, AND CIVILIANS TO DRIVE MARKET	147
9.3	AERIAL BOMBS	147
9.3.1	UNPARALLELED IMPACT AND VERSATILITY TO DRIVE MARKET	147
9.4	GRENADES	147
9.4.1	PORTABILITY AND MINIMAL TRAINING REQUIREMENTS TO DRIVE MARKET	147
9.5	ARTILLERY SHELLS	148
9.5.1	MILITARY MODERNIZATION PROGRAMS TO DRIVE MARKET	148
9.6	MORTARS	148
9.6.1	ABILITY TO DELIVER HIGH-ANGLE FIRE TO DRIVE MARKET	148
10	AMMUNITION MARKET, BY COMPONENT	149
10.1	INTRODUCTION	150
FIGURE 44	PROJECTILES & WARHEADS SEGMENT PROJECTED TO LEAD AMMUNITION MARKET FROM 2023 TO 2028	150
TABLE 38	AMMUNITION MARKET, BY COMPONENT, 2020-2022 (USD MILLION)	150
TABLE 39	AMMUNITION MARKET, BY COMPONENT, 2023-2028 (USD MILLION)	150
10.2	FUZES & PRIMERS	151
10.2.1	PRIMERS	151
10.2.1.1	Increasing global demand for firearms, self-defense, sporting, and military purposes to drive market	151
10.2.1.2	Rimfire primers	151
10.2.1.2.1	High demand for low-cost ammunition to drive market	151
10.2.1.3	Centerfire primers	151
10.2.1.3.1	Widely used in various firearm applications to drive market	151
10.2.2	FUZES	152
10.2.2.1	Wide applicability of fuzes in ammunition products to drive market	152
10.2.2.2	Time fuzes	152
10.2.2.2.1	High adoption in large-caliber ammunition to drive market	152
10.2.2.3	Impact fuzes	152
10.2.2.3.1	Growing adoption in conventional ammunition to drive market	152
10.2.2.4	Proximity fuzes	152
10.2.2.4.1	Increasing use in anti-aircraft applications to drive market	152
10.2.2.5	Combination fuzes	153
10.2.2.5.1	Increasing adoption in new range guided ammunition to drive market	153
10.3	PROPELLANTS	153
10.3.1	HIGH DEMAND FOR ARTILLERY SHELLS TO DRIVE MARKET	153
10.4	BASES	153
10.4.1	HIGH DEMAND FOR COPPER BASE IN CONVENTIONAL AMMUNITION TO DRIVE MARKET	153

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.5	PROJECTILES AND WARHEADS	154
10.5.1	INCREASING DEVELOPMENT OF NEW VARIETIES OF WARHEADS TO DRIVE MARKET	154
10.6	OTHERS	154
11	AMMUNITION MARKET, BY GUIDANCE MECHANISM	155
11.1	INTRODUCTION	156
	FIGURE 45	NON-GUIDED SEGMENT PROJECTED TO GROW AT HIGHER CAGR FROM 2023 TO 2028
	TABLE 40	AMMUNITION MARKET, BY GUIDANCE MECHANISM, 2020-2022 (USD MILLION)
	TABLE 41	AMMUNITION MARKET, BY GUIDANCE MECHANISM, 2023-2028 (USD MILLION)
11.2	GUIDED	157
11.2.1	LOW COLLATERAL DAMAGE TO DRIVE MARKET	157
11.3	NON-GUIDED	157
11.3.1	LOW COST AND VERSATILITY TO DRIVE MARKET	157
12	AMMUNITION MARKET, BY LETHALITY	158
12.1	INTRODUCTION	159
	FIGURE 46	LETHAL SEGMENT PROJECTED TO LEAD MARKET FROM 2023 TO 2028
	TABLE 42	AMMUNITION MARKET, BY LETHALITY, 2020-2022 (USD MILLION)
	TABLE 43	AMMUNITION MARKET, BY LETHALITY, 2023-2028 (USD MILLION)
12.2	LESS LETHAL	160
12.2.1	RIISING ADOPTION AMONG LAW ENFORCEMENT FOR CIVIL DISTURBANCES TO DRIVE MARKET	160
12.3	LETHAL	160
12.3.1	INCREASING DEFENSE EXPENDITURES & SOCIAL UNREST TO DRIVE MARKET	160
13	REGIONAL ANALYSIS	161
13.1	INTRODUCTION	162
	FIGURE 47	ASIA PACIFIC ACCOUNTED FOR LARGEST SHARE OF AMMUNITION MARKET IN 2022
	TABLE 44	AMMUNITION MARKET, BY REGION, 2020-2022 (USD MILLION)
	TABLE 45	AMMUNITION MARKET, BY REGION, 2023-2028 (USD MILLION)
	TABLE 46	AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION)
	TABLE 47	AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION)
	TABLE 48	AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2020-2022 (USD MILLION)
	TABLE 49	AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2023-2028 (USD MILLION)
	TABLE 50	AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2020-2022 (USD MILLION)
	TABLE 51	AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2023-2028 (USD MILLION)
	TABLE 52	AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION)
	TABLE 53	AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION)
	TABLE 54	SMALL-CALIBER AMMUNITION MARKET, BY TYPE, 2020-2022 (USD MILLION)
	TABLE 55	SMALL-CALIBER AMMUNITION MARKET, BY TYPE, 2023-2028 (USD MILLION)
	TABLE 56	MEDIUM-CALIBER AMMUNITION MARKET, BY TYPE, 2020-2022 (USD MILLION)
	TABLE 57	MEDIUM-CALIBER AMMUNITION MARKET, BY TYPE, 2023-2028 (USD MILLION)
	TABLE 58	LARGE-CALIBER AMMUNITION MARKET, BY TYPE, 2020-2022 (USD MILLION)
	TABLE 59	LARGE-CALIBER AMMUNITION MARKET, BY TYPE, 2023-2028 (USD MILLION)
	TABLE 60	AMMUNITION MARKET, BY PRODUCT, 2020-2022 (USD MILLION)
	TABLE 61	AMMUNITION MARKET, BY PRODUCT, 2023-2028 (USD MILLION)
	TABLE 62	AMMUNITION MARKET, BY COMPONENT, 2020-2022 (USD MILLION)
	TABLE 63	AMMUNITION MARKET, BY COMPONENT, 2023-2028 (USD MILLION)
	TABLE 64	AMMUNITION MARKET, BY GUIDANCE MECHANISM, 2020-2022 (USD MILLION)
	TABLE 65	AMMUNITION MARKET, BY GUIDANCE MECHANISM, 2023-2028 (USD MILLION)
	TABLE 66	AMMUNITION MARKET, BY LETHALITY, 2020-2022 (USD MILLION)

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 67	AMMUNITION MARKET, BY LETHALITY, 2023-2028 (USD MILLION)	168
13.2	REGIONAL RECESSION IMPACT ANALYSIS	168
TABLE 68	REGIONAL RECESSION IMPACT ANALYSIS	169
13.3	DEFENSE PROGRAM MAPPING	170
TABLE 69	GLOBAL: AMMUNITION DEFENSE PROGRAM MAPPING	170
13.4	NORTH AMERICA	172
13.4.1	PESTLE ANALYSIS	172
13.4.2	RECESSION IMPACT ANALYSIS	173
FIGURE 48	NORTH AMERICA: AMMUNITION MARKET SNAPSHOT	174
TABLE 70	NORTH AMERICA: AMMUNITION MARKET, BY COUNTRY, 2020-2022 (USD MILLION)	174
TABLE 71	NORTH AMERICA: AMMUNITION MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	174
TABLE 72	NORTH AMERICA: AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION)	175
TABLE 73	NORTH AMERICA: AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	175
TABLE 74	NORTH AMERICA: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2020-2022 (USD MILLION)	175
TABLE 75	NORTH AMERICA: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2023-2028 (USD MILLION)	175
TABLE 76	NORTH AMERICA: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2020-2022 (USD MILLION)	176
TABLE 77	NORTH AMERICA: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2023-2028 (USD MILLION)	176
TABLE 78	NORTH AMERICA: AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION)	176
TABLE 79	NORTH AMERICA: AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION)	176
TABLE 80	NORTH AMERICA: SMALL-CALIBER AMMUNITION MARKET, BY TYPE, 2020-2022 (USD MILLION)	177
TABLE 81	NORTH AMERICA: SMALL-CALIBER AMMUNITION MARKET, BY TYPE, 2023-2028 (USD MILLION)	177
TABLE 82	NORTH AMERICA: MEDIUM-CALIBER AMMUNITION MARKET, BY TYPE, 2020-2022 (USD MILLION)	177
TABLE 83	NORTH AMERICA: MEDIUM-CALIBER AMMUNITION MARKET, BY TYPE, 2023-2028 (USD MILLION)	178
TABLE 84	NORTH AMERICA: LARGE-CALIBER AMMUNITION MARKET, BY TYPE, 2020-2022 (USD MILLION)	178
TABLE 85	NORTH AMERICA: LARGE-CALIBER AMMUNITION MARKET, BY TYPE, 2023-2028 (USD MILLION)	178
TABLE 86	NORTH AMERICA: AMMUNITION MARKET, BY PRODUCT, 2020-2022 (USD MILLION)	179
TABLE 87	NORTH AMERICA: AMMUNITION MARKET, BY PRODUCT, 2023-2028 (USD MILLION)	179
TABLE 88	NORTH AMERICA: AMMUNITION MARKET, BY COMPONENT, 2020-2022 (USD MILLION)	179
TABLE 89	NORTH AMERICA: AMMUNITION MARKET, BY COMPONENT, 2023-2028 (USD MILLION)	179
TABLE 90	NORTH AMERICA: AMMUNITION MARKET, BY GUIDANCE MECHANISM, 2020-2022 (USD MILLION)	180
TABLE 91	NORTH AMERICA: AMMUNITION MARKET, BY GUIDANCE MECHANISM, 2023-2028 (USD MILLION)	180
TABLE 92	NORTH AMERICA: AMMUNITION MARKET, BY LETHALITY, 2020-2022 (USD MILLION)	180
TABLE 93	NORTH AMERICA: AMMUNITION MARKET, BY LETHALITY, 2023-2028 (USD MILLION)	180
13.4.3	US	180
13.4.3.1	Rise in demand for ammunition for civilian applications to drive market.	180
TABLE 94	US: AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION)	181
TABLE 95	US: AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	181
TABLE 96	US: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2020-2022 (USD MILLION)	181
TABLE 97	US: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2023-2028 (USD MILLION)	182
TABLE 98	US: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2020-2022 (USD MILLION)	182
TABLE 99	US: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2023-2028 (USD MILLION)	182
TABLE 100	US: AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION)	182
TABLE 101	US: AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION)	183
TABLE 102	US: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2020-2022 (USD MILLION)	183
TABLE 103	US: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2023-2028 (USD MILLION)	184
TABLE 104	US: MILITARY SMALL-CALIBER AMMUNITION, BY ROUNDS CONSUMPTION, 2020-2022 (MILLION UNIT)	184
TABLE 105	US: MILITARY SMALL-CALIBER AMMUNITION MARKET, BY ROUNDS CONSUMPTION, 2023-2028 (MILLION UNIT)	185

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

13.4.4 CANADA 185

13.4.4.1 Critical shortage in artillery shells to drive market 185

TABLE 106 CANADA: AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION) 185

TABLE 107 CANADA: AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 185

TABLE 108 CANADA: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2020-2022 (USD MILLION) 186

TABLE 109 CANADA: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2023-2028 (USD MILLION) 186

TABLE 110 CANADA: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2020-2022 (USD MILLION) 186

TABLE 111 CANADA: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2023-2028 (USD MILLION) 186

TABLE 112 CANADA: AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION) 187

TABLE 113 CANADA: AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION) 187

TABLE 114 CANADA: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2020-2022 (USD MILLION) 187

TABLE 115 CANADA: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2023-2028 (USD MILLION) 188

13.5 EUROPE 188

13.5.1 PESTLE ANALYSIS 188

13.5.2 RECESSION IMPACT ANALYSIS 189

FIGURE 49 EUROPE: AMMUNITION MARKET SNAPSHOT 190

TABLE 116 EUROPE: AMMUNITION MARKET, BY COUNTRY, 2020-2022 (USD MILLION) 190

TABLE 117 EUROPE: AMMUNITION MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 191

TABLE 118 EUROPE: AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION) 191

TABLE 119 EUROPE: AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 191

TABLE 120 EUROPE: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2020-2022 (USD MILLION) 191

TABLE 121 EUROPE: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2023-2028 (USD MILLION) 192

TABLE 122 EUROPE: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2020-2022 (USD MILLION) 192

TABLE 123 EUROPE: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2023-2028 (USD MILLION) 192

TABLE 124 EUROPE: AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION) 192

TABLE 125 EUROPE: AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION) 193

TABLE 126 EUROPE: SMALL-CALIBER AMMUNITION MARKET, BY TYPE, 2020-2022 (USD MILLION) 193

TABLE 127 EUROPE: SMALL-CALIBER AMMUNITION MARKET, BY TYPE, 2023-2028 (USD MILLION) 193

TABLE 128 EUROPE: MEDIUM-CALIBER AMMUNITION MARKET, BY TYPE, 2020-2022 (USD MILLION) 194

TABLE 129 EUROPE: MEDIUM-CALIBER AMMUNITION MARKET, BY TYPE, 2023-2028 (USD MILLION) 194

TABLE 130 EUROPE: LARGE-CALIBER AMMUNITION MARKET, BY TYPE, 2020-2022 (USD MILLION) 194

TABLE 131 EUROPE: LARGE-CALIBER AMMUNITION MARKET, BY TYPE, 2023-2028 (USD MILLION) 194

TABLE 132 EUROPE: AMMUNITION MARKET, BY PRODUCT, 2020-2022 (USD MILLION) 195

TABLE 133 EUROPE: AMMUNITION MARKET, BY PRODUCT, 2023-2028 (USD MILLION) 195

TABLE 134 EUROPE: AMMUNITION MARKET, BY COMPONENT, 2020-2022 (USD MILLION) 195

TABLE 135 EUROPE: AMMUNITION MARKET, BY COMPONENT, 2023-2028 (USD MILLION) 196

TABLE 136 EUROPE: AMMUNITION MARKET, BY GUIDANCE MECHANISM, 2020-2022 (USD MILLION) 196

TABLE 137 EUROPE: AMMUNITION MARKET, BY GUIDANCE MECHANISM, 2023-2028 (USD MILLION) 196

TABLE 138 EUROPE: AMMUNITION MARKET, BY LETHALITY, 2020-2022 (USD MILLION) 196

TABLE 139 EUROPE: AMMUNITION MARKET, BY LETHALITY, 2023-2028 (USD MILLION) 197

13.5.3 UK 197

13.5.3.1 NGMS program to drive market 197

TABLE 140 UK: AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION) 197

TABLE 141 UK: AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 197

TABLE 142 UK: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2020-2022 (USD MILLION) 197

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 143	UK: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2023-2028 (USD MILLION)	198
TABLE 144	UK: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2020-2022 (USD MILLION)	198
TABLE 145	UK: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2023-2028 (USD MILLION)	198
TABLE 146	UK: AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION)	198
TABLE 147	UK: AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION)	199
TABLE 148	UK: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2020-2022 (USD MILLION)	199
TABLE 149	UK: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2023-2028 (USD MILLION)	199
TABLE 150	UK: MILITARY SMALL-CALIBER AMMUNITION MARKET, BY ROUNDS CONSUMPTION, 2020-2022 (MILLION UNIT)	200
TABLE 151	UK: MILITARY SMALL-CALIBER AMMUNITION MARKET, BY ROUNDS CONSUMPTION, 2023-2028 (MILLION UNIT)	200
13.5.4		
FRANCE		
201		
13.5.4.1		
Increase in military and ammunition budget to drive market		
201		
TABLE 152	FRANCE: AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION)	201
TABLE 153	FRANCE: AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	201
TABLE 154	FRANCE: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2020-2022 (USD MILLION)	201
TABLE 155	FRANCE: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2023-2028 (USD MILLION)	201
TABLE 156	FRANCE: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2020-2022 (USD MILLION)	202
TABLE 157	FRANCE: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2023-2028 (USD MILLION)	202
TABLE 158	FRANCE: AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION)	202
TABLE 159	FRANCE: AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION)	202
TABLE 160	FRANCE: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2020-2022 (USD MILLION)	203
TABLE 161	FRANCE: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2023-2028 (USD MILLION)	203
TABLE 162	FRANCE: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY ROUNDS CONSUMPTION, 2020-2022 (MILLION UNIT)	203
TABLE 163	FRANCE: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY ROUNDS CONSUMPTION, 2023-2028 (MILLION UNIT)	204
13.5.5		
RUSSIA		
204		
13.5.5.1		
Ongoing conflict with Ukraine to drive market		
204		
TABLE 164	RUSSIA: AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION)	204
TABLE 165	RUSSIA: AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	204
TABLE 166	RUSSIA: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2020-2022 (USD MILLION)	205
TABLE 167	RUSSIA: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2023-2028 (USD MILLION)	205
TABLE 168	RUSSIA: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2020-2022 (USD MILLION)	205
TABLE 169	RUSSIA: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2023-2028 (USD MILLION)	205
TABLE 170	RUSSIA: AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION)	206
TABLE 171	RUSSIA: AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION)	206
TABLE 172	RUSSIA: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2020-2022 (USD MILLION)	206
TABLE 173	RUSSIA: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2023-2028 (USD MILLION)	206
13.5.6		
GERMANY		
207		
13.5.6.1		
Presence of key market players to propel demand for ammunition		
207		
TABLE 174	GERMANY: AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION)	207
TABLE 175	GERMANY: AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	207
TABLE 176	GERMANY: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2020-2022 (USD MILLION)	207
TABLE 177	GERMANY: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2023-2028 (USD MILLION)	207
TABLE 178	GERMANY: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2020-2022 (USD MILLION)	208
TABLE 179	GERMANY: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2023-2028 (USD MILLION)	208

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 180	GERMANY: AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION)	208
TABLE 181	GERMANY: AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION)	208
TABLE 182	GERMANY: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2020-2022 (USD MILLION)	209
TABLE 183	GERMANY: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2023-2028 (USD MILLION)	209
TABLE 184	GERMANY: MILITARY SMALL-CALIBER AMMUNITION MARKET, BY ROUNDS CONSUMPTION, 2020-2022 (MILLION UNIT)	210
TABLE 185	GERMANY: MILITARY SMALL-CALIBER AMMUNITION MARKET, BY ROUNDS CONSUMPTION, 2023-2028 (MILLION UNIT)	210
13.5.7	ITALY	211
13.5.7.1	Rising counter-terror operations to drive market	211
TABLE 186	ITALY: AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION)	211
TABLE 187	ITALY: AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	211
TABLE 188	ITALY: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2020-2022 (USD MILLION)	211
TABLE 189	ITALY: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2023-2028 (USD MILLION)	212
TABLE 190	ITALY: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2020-2022 (USD MILLION)	212
TABLE 191	ITALY: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2023-2028 (USD MILLION)	212
TABLE 192	ITALY: AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION)	212
TABLE 193	ITALY: AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION)	213
TABLE 194	ITALY: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2020-2022 (USD MILLION)	213
TABLE 195	ITALY: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2023-2028 (USD MILLION)	213
13.5.8	SPAIN	214
13.5.8.1	Rising demand for mortar and artillery ammunition to drive market	214
TABLE 196	SPAIN: AMMUNITION MARKET, BY APPLICATION, 2020-2022 (USD MILLION)	214
TABLE 197	SPAIN: AMMUNITION MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	214
TABLE 198	SPAIN: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2020-2022 (USD MILLION)	214
TABLE 199	SPAIN: AMMUNITION MARKET FOR DEFENSE, BY TYPE, 2023-2028 (USD MILLION)	215
TABLE 200	SPAIN: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2020-2022 (USD MILLION)	215
TABLE 201	SPAIN: AMMUNITION MARKET FOR CIVIL & COMMERCIAL, BY TYPE, 2023-2028 (USD MILLION)	215
TABLE 202	SPAIN: AMMUNITION MARKET, BY CALIBER, 2020-2022 (USD MILLION)	215
TABLE 203	SPAIN: AMMUNITION MARKET, BY CALIBER, 2023-2028 (USD MILLION)	216
TABLE 204	SPAIN: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2020-2022 (USD MILLION)	216
TABLE 205	SPAIN: SMALL-CALIBER AMMUNITION MARKET FOR MILITARY, BY NATO GRADE CALIBER, 2023-2028 (USD MILLION)	216

**Ammunition Market by Application (Defense, Civil & Commercial), Caliber (Small, Medium, Large), Product (Bullets, Aerial Bombs, Artillery Shells, Mortars), Component, Guidance Mechanism, Lethality (Lethal, Less-lethal), and Region -Global
Forecast to 2028**

Market Report | 2024-04-12 | 382 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*

Country*

Date

Signature