

Ammunition - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Ammunition Market size is estimated at USD 33.00 billion in 2025, and is expected to reach USD 40.25 billion by 2030, at a CAGR of 4.05% during the forecast period (2025-2030).

Defense expenditures in key nations like the US, China, India, Russia, and France have grown significantly in recent years. This surge is fueled by escalating political tensions, heightened cross-border conflicts, and a rise in terrorist activities. Consequently, nations increasingly prioritize bolstering their defense capabilities, creating a heightened demand for weapons and ammunition. This uptick in demand, especially for advanced weaponry, enhances defense capabilities and ensures greater security for soldiers.

While small-caliber ammunition finds broad civilian applications in activities like hunting, sports shooting, and personal protection, medium and large-caliber ammunition predominantly serves defense purposes. Nations are actively modernizing their armed forces, upgrading weaponry, and adapting to the evolving landscape of military technology. This evolution necessitates ammunition that is compatible with these advanced weapon systems. Moreover, nations are keen on replacing their aging ammunition with newer variants that boast extended lifespans and enhanced storage and handling features, a significant driver for the market.

However, technological constraints and stringent government regulations governing firearm usage tempered the market's growth.

Ammunition Market Trends

Small Caliber Ammunition to Dominate Market Share During the Forecast Period

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Small ammunition remains a staple in military and law enforcement training procurement. Globally, the demand for small-caliber ammunition is further fueled by border disputes, militant threats, terrorism, and civil unrest. The market's trajectory hinges on various factors, including budget allocations for new equipment. However, this growth could be hampered by the swift obsolescence of emerging technologies.

As nations bolster their defense with increased investments, particularly in modernizing military programs, the demand for small-caliber ammunition sees a significant upswing. Notably, countries increasingly emphasize local production in the arms and ammunition sector, with many governments mandating local production and reinvestment offsets in their military procurement strategies. These trends collectively point to a promising forecast for the small-caliber ammunition market.

North America to Dominate Market Share During the Forecast Period

The evolving landscape of warfare is a crucial driver behind the rising defense expenditures of the US Department of Defense (DoD). Extensive testing is conducted on weapons to ensure operational reliability and gauge the performance enhancements of new integrated designs. In 2023, the US held its position as the world's top defense spender, allocating a staggering USD 916 billion to its defense budget. Specifically, the US earmarked USD 4.7 billion for weapons procurement.

Highlighting the nation's strategic focus, a December 2023 notice revealed that the US Special Operations Command is actively engaged in market research for an "Extreme Long Range-Sniper Rifle" (ELR-SR). This rifle is designed to deliver precise fire at distances of up to 2,500 meters (2,730 yards), emphasizing the US's intent to maintain a technological edge, especially against nations like China and Russia. Geopolitical tensions have spurred the US to bolster its investments in advanced weapon systems and ammunition, aligning its capabilities with its adversaries.

Furthermore, the US's active involvement in NATO missions abroad has increased demand for a diverse range of ammunition. Beyond infantry weapons, the US Army is channeling resources into modernizing its mortar and artillery systems. This modernization drive aims to enhance these systems' responsiveness, survivability, range, and accuracy, ensuring they remain at the forefront of technological advancements. With such robust procurement strategies and a focus on advanced ammunition development, the region's defense market is poised for significant growth in the coming years.

Ammunition Industry Overview

The ammunition market is fragmented, with several global and local ammunition manufacturing companies. However, it is dominated by large international players like KNDS N.V., BAE Systems plc, Rheinmetall AG, General Dynamics Corporation, and RUAG Group. At the same time, the rest of the market share is controlled mainly by players in local defense industries of several countries.

Companies ramp up their research and development efforts to meet future demand, focusing on creating advanced munitions. These munitions are designed for 'fire and forget' capabilities, enhancing weapon lethality and expanding their impact radius. In tandem, munition suppliers are pushing boundaries, extending the range, and broadening the potential impact zones to align with future weapon systems and modern warfare needs. Recognizing the strategic importance, nations are significantly bolstering their local ammunition manufacturing capabilities. With major procurement nations pivoting towards developing indigenous models for both domestic and international markets, players stand to gain from early investments in unique munition designs and bolstered domestic production.

Additional Benefits:

- The market estimate (ME) sheet in Excel format

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