

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

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### **Report description:**

The Medium Caliber Ammunition Market size is estimated at USD 1.27 billion in 2025, and is expected to reach USD 1.41 billion by 2030, at a CAGR of 2.16% during the forecast period (2025-2030).

#### Key Highlights

- The growing geopolitical issues and border tensions have led to robust growth in military spending of the countries. This is propelling the investment of armed forces into new generation land, air, and sea platforms. This is expected to drive the growth of the market in the coming years.
- The medium-caliber ammunition market is expected to grow primarily due to the procurement and upgrade activities undertaken by armed forces to counter the emerging threats. Several contracts for naval vessels, military aircraft, helicopters, infantry fighting vehicles (IFVs), and armored personnel carriers (APCs) mounted with medium caliber turret guns are currently underway, and many new contracts are anticipated to be dispersed during the forecast period, creating a parallel demand for medium caliber ammunition.
- Few countries follow a protectionist strategy to protect the domestic ammunition industry against foreign monopoly. Such laws and regulations serve as a deterrent for foreign companies trying to expand into other countries.

#### Medium Caliber Ammunition Market Trends

##### Lethal Segment Accounts for Largest Share in 2021

The lethal segment of the market currently dominates the market and is expected to continue its dominance over the market

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during the forecast period. Lethal ammunition is used by the military and law enforcement agencies. Escalating security threats and territorial disputes have compelled armed forces to stockpile their armory with weapons that use medium-caliber ammunition. The stockpiled weapons range from stationary and platform-mounted heavy machine guns (HMGs) and automatic cannons to air defense systems and C-RAM applications. The medium caliber weapons are installed on military aircraft, helicopters, main battle tanks (MBTs), infantry fighting vehicles (IFVs), and armored personnel carriers (APCs), among others. The emergence of impact-resistant armor on modern military vehicles has necessitated the induction of medium-caliber weaponry as one of the prime choices for a wide array of battlefield effectors. In 2021, Oshkosh Defense received multiple contracts worth USD 229 million from the US Army Contracting Command, Detroit Arsenal (ACC- DTA) to upgrade various batches of Stryker Brigade Combat Team (SBCT) with the 30 mm Medium Caliber Weapon System (MCWS). Under the contracts, the company would upgrade the weapon systems on 174 Stryker combat vehicles (two Stryker Brigade Combat Team (SBCT)). Under the fleet modernization plan, the US Army plans to upgrade up to six Stryker brigades with Oshkosh Defense MCWS. With military modernization programs being rolled out in most countries, like India, the United States, and the United Kingdom, among others, the market for lethal weapons and their ammunition is expected to witness accelerated growth during the forecast period.

#### Asia-Pacific Region is Expected to Generate the Highest Demand During the Forecast Period

The Asia-Pacific region is expected to witness rapid growth during the forecast period, primarily due to the increasing demand for medium-caliber ammunition in countries like India, China, Japan, and South Korea. Major countries in the Asia-Pacific region have increased their defense spending in the past few years, focused on strengthening their armed forces against growing geopolitical tensions and terror threats. For instance, according to the Congressional Research Service, China is expected to introduce more than four aircraft carriers, more than 39 cruisers and destroyers, and more than 38 frigates and corvettes during the period of 2020 - 2040 period. Similarly, the Indian Air Force (IAF) is planning to acquire 450 fighter aircraft for deployment on the northern and western frontiers of the country by 2035. In January 2021, India signed off an order for 83 Hindustan Aeronautics' (HAL) Tejas Mk-1A Light Combat Aircraft. The order covers 73 single-seat Tejas Mk-1As and 10 two-seat trainers. It is worth USD 6.4 billion. The production of Tejas Mark 2 is expected to begin in 2023 as the IAF approved its design in December 2021. The Tejas Mk-1 aircraft is equipped with a 23 mm twin-barrel GSh-23 cannon. Similar aircraft, armored vehicles, and naval vessels modernization plans of the armed forces is expected to boost the growth of the market during the forecast period

#### Medium Caliber Ammunition Industry Overview

The market is dominated by global defense systems and technology providers, such as General Dynamics Corporation, BAE Systems PLC, Rheinmetall AG, Northrop Grumman Corporation, and Nexter Systems KNDS. The majority of the geographic regions have local players who are equally strong, providing smaller sub-systems of a larger network/project in partnership with the global leaders. Over the years, the local players have mastered technology and product design, and they are expected to become threats to the existing large players who have been demanding monopoly-style prices for their products and services in exchange for brand value, reliability, and quality. Local players in North America, the Middle-East, and Asia regions are particularly threatening the global leaders as they aim to provide an all-around solution at a fraction of the cost quoted by these global leaders without compromising on quality or reliability. Furthermore, keeping in view the sanctions made by the United States against Russia and China, countries in the region are aggressively producing medium-caliber ammunition to meet their needs without the support of international manufacturers to avoid the situation of Russia and China, in the future.

#### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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