

# Global Military Land Vehicles Market Assessment, By Vehicle Type [Armored Fighting Vehicles, Tactical Vehicles, Logistical Vehicles], By Mobility [Wheeled, Tracked, Amphibious], By Technology [Electric/Hybrid, Internal Combustion Engine, Autonomous Systems], By Region, Opportunities and Forecast, 2018-2032F

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#### **Report description:**

Global military land vehicles are projected to witness a CAGR of 4.20% during the forecast period 2025-2032, growing from USD 26.52 billion in 2024 to USD 36.85 billion in 2032. Countries from all over the world strengthen their military power through the purchase of innovative military vehicles to drive the expansion of the global military land vehicle market. The military land vehicle market expands because defense spending increases and governments allocate more funds to their defense budgets which generates a higher need for military land vehicles in international markets. Military land vehicles demand advanced technology because contemporary warfare continues to evolve toward more advanced operational styles that need sophisticated defense systems. The military achieves the development of sophisticated land vehicles through continuous technological advancements and the appearance of innovative technical features.

Military land vehicles fulfill various roles such as infantry fighting vehicles, armored personnel carriers, main battle tanks, light multi-role vehicles, and tactical trucks. Each type of vehicle is tailored to its specific defense applications and provides a relatively improved military capability. Military modernizations, geopolitical tensions, and military operations represent necessary ongoing spending for defense applications. Military vehicle electrification is a rising trend in the market. Technology brings multiple benefits to the table, such as lower fuel usage, reduced emissions and better operational stability. Military land vehicle manufacturers worldwide maintain their strategic focus on security, adaptability, and technological evolution alongside global defense requirements. The ongoing pursuit of operational enhancements by military units, together with strategic goal achievement, drives continuous investments toward next-generation land vehicles equipped with advanced technology, thus creating a sustainable market for multiple future vehicle iterations.

For instance, in January 2025, the initial Boxer armored vehicle manufactured in the United Kingdom was formally unveiled at the

International Armored Vehicles (IAV) Conference. The Boxer vehicle has been produced at Rheinmetall BAE Systems Land (RBSL) in Telford under the U.K.'s Mechanized Infantry Vehicle (MIV) Programme.

Increasing Geopolitical Tensions Drive the Military Land Vehicle Market

Rising geopolitical pressures lead countries to hike defense spending. With additional investment, military services can acquire new ground vehicles, replace old equipment, and enhance readiness against potential threats. Geopolitical pressures can propel nations to grow in their military modernization program and procurements. Modernizing extends to all forms of land vehicle fleets, replacing legacy equipment with modern platforms that will take advantage of new mobility, protection, firepower, and communication capabilities. Geopolitical pressures that exist between great powers and strategic competitors can accelerate efforts to develop and field new technology, including land vehicles. Competition between great powers and strategic adversaries can create pressure, promote innovation, and lead to the creation of next-generation vehicles that are supposed to create, maintain, or gain competitive advantage.

For instance, in October 2024, Russia's KamAZ opened a production plant in Senegal to manufacture both military trucks and MRAP (Mine-Resistant Ambush Protected) vehicles, including the Typhoon-K, marking a major step in Russia-Senegal defense and industrial cooperation.

#### Technological Advancements in Military Land Vehicles

The rise in technological innovations is another major force fueling the military land vehicles market. The introduction of advanced technologies such as artificial intelligence, unmanned platforms, and better communication systems in military vehicles is transforming the face of defense operations. The inclusion of electric and hybrid military vehicles is also prominent, keeping in view sustainable military practices to minimize carbon footprints. This technological development not only improves combat capability but also cuts defense budget costs, thus being a driving force for the military land vehicles market growth. The use of lightweight composite materials in vehicles enables manufacturers to build protective systems with improved mobility features which maintain durability as advanced military vehicles emerge through sensor technology and artificial intelligence in the military environment.

For instance, in April 2025, the Taiwanese Army unveiled an upgraded version of the M1167 Humvee, with improved armor, bulletproof glass, and an advanced TOW anti-tank-guided missile system with day-and-night targeting. All these upgrades should enhance survivability, firepower, and mobility, while also increasing Taiwan's anti-armor capability at a time when regional security threats are on the rise.

#### Armored Vehicles Dominate the Military Land Vehicles Market

Armored vehicles continue to be at the forefront of military land vehicles. The rising global security threats have led numerous countries to dedicate substantial financial resources and military assets toward developing armored platforms for troop protection and operational dominance. Contemporary armored vehicles combine advanced technological elements through their design which includes reactive armor and composite armor as well as active protection systems and integrated digital communication systems to enhance their battlefield capabilities. Most modern platforms incorporate modular designs, and many of these systems have the capability or potential for rapid upgrades and mission-specific configurations. There is certainly a strong trend towards better mobility and firepower, as well as a need for subjecting the increase in crew protection, and with governments committing to modernize and grow their fleets, it is suitable that the modernization of the armored vehicle segment will only continue to grow.

For instance, in May 2025, Rheinmetall and Indra Group signed a strategic cooperation agreement to work on armored solutions for the Spanish Armed Forces (FAS). With Rheinmetall's proficiency in vehicle manufacturing and Indra's proficiency in defense electronics, the two companies aim to assist the FAS in advancing its armored fleet while increasing European defense capabilities.

North America Dominates the Military Land Vehicle Market

The massive defense spender globally is the United States, which is a key contributor to the North American military land vehicles industry. Its defense budget funds the procurement, development, and maintenance of a varied fleet of ground vehicles for different military branches. North American military firms are significant players in the international arms market, selling military land vehicles to allies and partners. The US Foreign Military Sales (FMS) program permits the export of defense equipment, mostly land vehicles, to established foreign governments, thus supporting market growth. North American defense corporations are

increasingly turning their attention towards cybersecurity and information warfare capabilities to defend military networks, command systems, and communication platforms incorporated into land vehicles.

The Asia-Pacific region confronts numerous security threats, which involve territorial conflicts, together with local disputes and emerging asymmetrical dangers. Governmental organizations in the area allocate financial resources to develop military equipment, particularly land vehicles, to enhance their defense capabilities and protect national safety. The Asia-Pacific area has seen a rising number of local defense manufacturers who develop land vehicle technologies for the military sector. South Korea, together with India and Singapore, operates its national armored vehicle production systems that enhance regional independence while expanding export possibilities. The rising economic development, together with infrastructure expansion across Asia-Pacific, enables military land vehicles to operate in various operational settings, including urban zones and remote regions, and maritime zones.

For instance, in May 2024, Textron Systems Corporation and Kodiak Robotics Inc. partnered to develop a military ground vehicle for fully driverless operations. By integrating Kodiak's autonomous [Kodiak Driver] technology and Defense Pods sensor suites into Textron's vehicle platform, the collaboration aims to deliver advanced, uncrewed vehicles for high-risk military missions and logistics support.

Impact of U.S. Tariffs on Military Land Vehicles Market

Tariffs on steel, aluminum, and vehicle parts are high costs for manufacturing armored and tactical vehicles.

Companies are switching to United States-made components to escape tariffs, impacting sourcing strategies and schedules.

Defense contractors face delays and higher prices for imported components, prompting supply chain re-evaluation.

Increased costs could strain military budgets or push out procurement programs, particularly for large vehicle fleets.

Tariffs are pushing the industry to invest in domestic manufacturing, potentially encouraging innovation but requiring upfront investment.

Key Players Landscape and Outlook

The global market for military land vehicles faces substantial rivalry between multiple leading international producers that drive advancements in the defense sector technology. Multiple market leaders maintain extensive product ranges that feature armored personnel carriers, infantry fighting vehicles, main battle tanks, and specialized tactical vehicles. The industry's most prominent organizations commit substantial resources to research and development for producing forward-thinking mobile vehicles that match contemporary military needs. Businesses in this industry use strategic partnerships along with merger and acquisition activities to enhance their technological expertise and worldwide market presence.

For instance, in January 2025, Rheinmetall and Leonardo received regulatory approval to form Leonardo Rheinmetall Military Vehicles (LRMV), a joint venture based in Rome. LRMV will develop and market advanced military vehicles, including a new Italian main battle tank based on the Panther KF51 and the Lynx platform for the Armored Infantry Combat System programme.

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