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Artillery Systems Market Research Report - Global Forecast to 2032

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Description:

Global Artillery Systems Market Overview

Artillery Systems Market Size was valued at USD 5.8 Billion in 2022. The artillery systems market industry is projected to grow from USD 6.218 Billion in 2023 to USD 10.8620 Billion by 2032, exhibiting a compound annual growth rate (CAGR) of 7.22% during the forecast period (2023 - 2032). Due to market drivers such as strong demand from the military sector and several programs relating to military modernization across various countries, the artillery systems market is predicted to experience respectable growth during the forecast period.

Artillery Systems Market Overview

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Artillery Systems Market Trends

- **Increased defense expenditure is driving the market growth**

The architecture of the international security system has been damaged by the rising hegemonism, unilateralism, and influence politics that have stoked multiple crises due to the fundamental changes in the international strategic landscape. The ambiguity surrounding many countries' territorial claims, such as the Middle Eastern Cold War between Saudi Arabia and Iran, is one of the key things disturbing the geopolitical situation. The government's most typical approach to this problem is to spend more money on the military to boost security at home. Military superpowers like the United States, the United Kingdom, China, and India have enhanced their military equipment and combat abilities. The armed services are updating their weaponry, and some development and procurement work is being done to ensure the current defensive systems are combat-ready. Additionally, the drive for indigenization affects how these systems are created locally in different countries. military spending increased by 2.6% in real terms from 2019 to USD 1981 billion in 2020. Military spending has increased more quickly in recent years; it will be 9.3% higher in 2020 than in 2011. According to SIPRI, the countries with the biggest military expenditures worldwide in 2020 were the United States, China, India, Russia, and the United Kingdom. These nations collectively accounted for 62% of spending. As a result, a portion of the defense spending plans are diverted to such programs, the expansion of which puts the market's prospects in the spotlight.

Furthermore, many current crises have been stoked by the growing hegemonism, unilateralism, and power politics due to the significant changes in the worldwide strategic environment, compromising the design of the international security system. Countries' sizable investments may aid the forecasted expansion of the market for artillery systems in modernizing their armed forces. To gain a tactical edge on the battlefield, nations are focusing on building long-range fire capabilities. Countries like the United States are launching the purchase of artillery systems to build long-range precision firing capabilities. Increasing the military's strength becomes crucial for all nations as their challenges grow more serious. Due to this expansion, which is the main driver of the market, a percentage of defense funds are allotted to these programs.

Additionally, the ground forces benefit from long-range artillery cover fire by disabling enemy fire support. The S35 Koalitsiya-SV self-propelled howitzer, a short barrel artillery system, was recently constructed by Russia in 2020 in its first batch and featured an automatic real-time firing control system. Koalitsiya-SV outperforms all other similar artillery systems by employing 152 mm rounds up to a range of 50 KM and being able to fire up to 10 rounds per minute. The artillery system market is anticipated to grow as a result of this long-range weapon system development. Thus, driving the artillery systems market revenue.

Artillery Systems Market Segment Insights

Artillery Systems Range Insights

The artillery systems market segmentation, based on range includes Short Range, Medium Range and Long Range. The short range segment dominated the market. A range of 5- to 30 km has been established for short-range artillery systems. Short-range artillery weapons are useful against close-range, lower-flying targets when efficiency and accuracy are crucial to guaranteeing the survival of the deployed men. The necessity for such systems has grown recently as most Asia-Pacific countries grapple with a geopolitical split.

Figure 1: Artillery Systems Market, by Range, 2022 & 2032 (USD Billion)

Artillery Systems Market, by Range, 2022 & 2032

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Artillery Systems Component Insights

The artillery systems market segmentation, based on component, includes gun turret, fire control system, ammunition handling system, auxiliary system and others. The fire control system category generated the most income because there is a growing need for weapon assemblies with fast fire rates and reduced recoil. The need for Auxiliary Systems will rise by 2.1% from 2022 to 2029 due to increased demand for weapon systems designs for creating low-cost reproductions of weapon assembly by the ordnance factories in nations like China and India.

Artillery Systems Type Insights

The artillery systems market segmentation, based on type, includes mortars, howitzers, rocket artillery and others. The howitzers category generated the most income. The howitzer, an armored mobile artillery system, is widely used as a combat support weapon. In order to avoid counter-battery fire, these systems frequently use their ability to launch shoot-and-scoop attacks. In December 2020, the People's Liberation Army unveiled an assault vehicle-based howitzer that offers more mobility than truck-based howitzers and can operate in difficult off-road terrains where other types of artillery cannot.

Artillery Systems Regional Insights

By region, the study provides the market insights into North America, Europe, Asia-Pacific and Rest of the World. The North American artillery systems market area will dominate this market. The United States, the largest military spender in the world, is occupied with the most cutting-edge and substantial amount of defense equipment, which significantly contributes to the market's growth in North America due to the rising demand for superior protection solutions in the defense and military sectors.

Further, the major countries studied in the market report are the US, Canada, German, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 2: ARTILLERY SYSTEMS MARKET SHARE BY REGION 2022 (USD Billion)

ARTILLERY SYSTEMS MARKET SHARE BY REGION 2022

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Europe artillery systems market accounts for the second-largest market share owing to an increase in terrorist assaults. The market growth in the region is encouraged by European nations including the UK, France, Russia, and Germany. Further, the German artillery systems market held the largest market share, and the UK artillery systems market was the fastest growing market in the European region.

The Asia-Pacific artillery systems market is expected to grow at the fastest CAGR from 2023 to 2032. The military forces of several Asia Pacific nations are likely to modernize their combat platforms, which would help the market for artillery systems in the region grow. One of the major nations investing in artillery systems and related technology is South Korea, China, and India. Moreover, China's artillery systems market held the largest market share, and the Indian artillery systems market was the fastest growing market in the Asia-Pacific region.

Artillery Systems Key Market Players & Competitive Insights

Leading market players are investing heavily in research and development in order to expand their product lines, which will help the artillery systems market grow even more. Market participants are also engaging in a range of strategic initiatives to broaden their reach. Significant market developments include new product launches, contractual agreements, mergers and acquisitions, greater investments, and collaboration with other organisations. To expand and survive in a more competitive and rising market climate, artillery systems industry must offer cost-effective items.

Manufacturing locally to minimize operational costs is one of the key business tactics used by manufacturers in the artillery systems industry to benefit clients and increase the market sector. In recent years, the artillery systems industry has offered some of the most significant advantages to

the market. Major players in the artillery systems market attempting to increase market demand by investing in research and development operations include Avibras (Brazil), BAE Systems (UK), China North Industries Corporation (Norinco) (China), Denel SOC Ltd (South Africa), Elbit Systems (Israel), General Dynamics (US), Hanwha Group (South Korea), IMI Systems (Israel), Kmw+Nexte Defense Systems (Netherlands) and Lockheed Martin (US).

Elbit Systems Ltd creates systems and tools for C4ISR (command, control, communications, computers, intelligence, surveillance, and reconnaissance) and aerospace applications. The business sells cutting-edge electro-optic and countermeasures systems, unmanned aircraft systems (UAS), unmanned surface ships, military aircraft, airborne systems, helicopter systems, aerostructures and systems, helmet-mounted systems, and land and naval systems. For homeland security, defense, and commercial aviation markets, Elbit Systems modernizes military platforms and creates new technology. In March 2022, Elbit Systems Ltd. reported receiving contracts for delivering an artillery munitions production line in an Asia-Pacific nation, with an estimated value of about USD 130 million. The contracts will be carried out over 2.5 years.

As a leading provider of aerospace and security products and services, Lockheed Martin Corp. conducts research, designs, develops, manufactures, integrates, and maintains technological systems, goods, and services. Aeronautics, Missiles and Fire Control (MFC), Rotary and Mission Systems (RMS), and Space are the four business segments it conducts. In September 2020, the US Army gave Lockheed Martin a contract worth USD 183 million to produce and provide 28 High Mobility Artillery Rocket System launchers and associated hardware. The first deliveries are expected to start in 2022.

Key Companies in the artillery systems market include

- Avibras (Brazil)
- BAE Systems (UK)
- China North Industries Corporation (Norinco) (China)
- Denel SOC Ltd (South Africa)
- Elbit Systems (Israel)
- General Dynamics (US)
- Hanwha Group (South Korea)
- IMI Systems (Israel)
- Kmw+NexterDefense Systems (Netherlands)
- Lockheed Martin (US)

Artillery Systems Industry Developments

September 2022: The Korean Tactical Surface-to-Surface Missile (KTSSM) system will commence mass production in 2023, according to a statement made by Hanwha Corporation on September 22 during the DX Korea 2022 exhibition in Goyang.

December 2021: Australia and South Korea agreed to a deal for Australia to purchase 30 K-9 Thunder self-propelled howitzers. Australia is the seventh nation to purchase the howitzer produced in South Korea.

October 2021: The Netherlands obtained a new order for 155mm illumination and smoke/obscurant artillery shells from Rheinmetall. The projectiles will arrive in the Netherlands in the middle of 2023.

Artillery Systems Market Segmentation

Artillery Systems Range Outlook

- Short Range
- Medium Range
- Long Range

Artillery Systems Component Outlook

- Gun Turret
- Fire Control System
- Ammunition Handling System

- Auxiliary System
- Others

Artillery Systems Type Outlook

- Mortars
- Howitzers
- Rocket Artillery
- Others

Artillery Systems Regional Outlook

North America

US

Canada

Europe

Germany

France

UK

Italy

Spain

Rest of Europe

Asia-Pacific

China

Japan

India

Australia

South Korea

Australia

Rest of Asia-Pacific

Rest of the World

Middle East

Africa

Latin America

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