

Air-to-Surface Missiles Market Size & Share Analysis - Growth Trends and Forecast (2025 - 2030)

> ****Industry:**** Missiles, Defense Systems & Radars (Aerospace & Defense)
> ****Source:**** <https://www.mordorintelligence.com/industry-reports/air-to-surface-missiles-market>
> ****Scraped Date:**** 2026-09-17

Executive Market Summary

Market Metric	Details
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Base Market Size	USD 5.98 billion
Projected Forecast (2031)	USD 5.98 billion
Growth Rate (CAGR)	8.54 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Air-to-Surface Missiles industry](images/chart_2.png)

! [Air-to-Surface Missiles Market Size](images/chart_3.png)

! [Air-to-Surface Missiles Market Share by Launch Platform, 2024](images/chart_4.png)

! [Air-to-Surface Missiles Market Share by Guidance, 2024](images/chart_5.png)

! [Air-to-Surface Missiles Market CAGR (%), Growth Rate by Region](images/chart_6.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview	Study Period	2019 - 2030
Market Size (2025)		USD 5.98 Billion
Market Size (2030)		USD 9.01 Billion
Growth Rate (2025 - 2030)		8.54 %
Fastest Growing Market		Asia Pacific
Largest Market		North America
Market Concentration		High
Major Players	*Disclaimer: Major Players sorted in no particular order	

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Market Overview

Air-to-Surface Missiles Market Analysis by Mordor Intelligence The air-to-surface missiles market size is valued at USD 5.98 billion in 2025 and is forecasted to reach USD 9.01 billion by 2030, expanding at an 8.54% CAGR. Rapid modernization programs, rising regional tensions, and a clear preference for standoff precision strike weapons underpin this expansion, pushing governments to place multi-year orders that de-risk industrial capacity investments. The Pentagon's USD 29.8 billion munitions request for FY2025, its largest on record, illustrates how buyers front-load demand signals to replenish stockpiles and fund next-generation systems. Hypersonic propulsion breakthroughs, such as Northrop Grumman's scramjet exceeding Mach 5, compress decision cycles and spur platform upgrades that can carry heavier, faster weapons. At the same time, AI-enabled multi-mode seekers improve survivability against electronic warfare, encouraging adoption across fighter, bomber, and UAV fleets. Finally, production-rate increases—MBDA alone plans to double output by 2025—signal that prime contractors are scaling to meet a higher-volume, longer-duration demand environment.

Key Report Takeaways* By launch platform, combat aircraft led with 47.56% of the air-to-surface missiles market share in 2024; UAVs are projected to advance at an 11.25% CAGR through 2030.

* By range, medium-range missiles commanded a 49.21% share of the air-to-surface missiles market in 2024, while long-range variants are expanding at a 10.42% CAGR to 2030.

* By propulsion, solid rocket accounted for 34.75% of the air-to-surface missile market in 2024; ramjet and scramjet solutions are rising at a 9.55% CAGR through 2030.

* By guidance, inertial and GPS combinations held 36.89% of the air-to-surface missiles market share in 2024; multi-mode seekers are growing at a 9.91% CAGR over the same period.

* By speed class, subsonic designs retained 58.34% share of the air-to-surface missiles market size in 2024, whereas hypersonic weapons are set to grow at an 11.80% CAGR to 2030.

* By geography, North America held 36.18% revenue share in 2024, while Asia-Pacific is set to deliver the highest 10.75% CAGR over 2025-2030.

Key Market Trends

Market Trends and Insights Drivers Impact Analysis of Air-to-Surface Missiles Market*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

Increasing defense spending allocated to precision-guided strike capabilities | +1.5% | Global | Medium term (2-4 years) |

Ongoing aircraft modernization programs integrating advanced standoff munitions | +1.8% | North America, Europe, Asia-Pacific | Long term (≥ 4 years) |

Rising demand for low-collateral-damage munitions in counter-insurgency operations | +1.2% | Middle East, Africa | Short term (≤ 2 years) |

Emergence of advanced air defense systems driving need for longer-range, high-speed ASMs | +1.4% | Asia-Pacific, Europe, Middle East | Medium term (2-4 years) |

Adoption of AI-enabled multi-mode seekers improving target accuracy in contested environments | +0.9% | North America, Europe | Long term (≥ 4 years) |

Development of modular, aircraft-agnostic pylons enabling rapid ASM integration across platforms | +0.6% | North America, Europe | Medium term (2-4 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

Industry concentration remains high as the prime contractors dominate end-to-end missile design, propulsion, guidance, and integration. Vertical integration allows them to safeguard intellectual property and mitigate supplier disruptions, yet it raises entry barriers for innovative startups. Regulatory bodies are increasingly alert to consolidation risks; the FTC's intervention against Lockheed Martin's attempted Aerojet Rocketdyne purchase preserved propulsion competition and signaled stricter scrutiny for future deals.

Technology leadership has become the chief differentiator. MBDA's Orchestrike AI for SPEAR cruise missiles exemplifies how embedded autonomy can extend weapon lethality without compromising human agency. Northrop Grumman and GE Aerospace focus on dual-mode ramjets to unlock mass-producible hypersonic missiles, while Lockheed Martin leverages model-based engineering to halve integration timelines across multiple airframes.

Cost-effective precision has emerged as an exploitable white space: firms such as L3Harris and Mach Industries market modular mini-cruise missiles priced below USD 0.3 million, targeting customers who cannot afford high-end hypersonic rounds. At the same time, additive-manufacturing pioneers are courting primes with rapid prototyping capabilities that compress design-to-flight schedules. These trends ensure that, despite oligopolistic structures, innovation cycles within the air-to-surface missiles market remain vigorous.

Air-to-Surface Missiles Industry Leaders* Lockheed Martin Corporation

* RTX Corporation

* MBDA

* Rafael Advanced Defense Systems Ltd.

* The Boeing Company

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global Air-to-Surface Missiles Market Report ScopeBy Launch PlatformCombat Aircraft |

Bomber Aircraft |

Rotary-Wing Aircraft |

Unmanned Aerial Vehicles (UAVs) |

Segmentation Accordion Item

By GeographyNorth America | United States |

| Canada |

| Mexico |

Europe | United Kingdom |

| France |

| Germany |

| Italy |

| Russia |

| Rest of Europe |

Asia-Pacific | China |

| India |

| Japan |

| South Korea |

| Rest of Asia-Pacific |
South America | Brazil |
| Rest of South America |
| |
Middle East and Africa | Middle East | Saudi Arabia |
	United Arab Emirates
	Israel
	Rest of Middle East
Africa	South Africa
	Rest of Africa

Frequently Asked Questions

What is the current global value of the air-to-surface missiles market?

The air-to-air missiles market stands at USD 5.98 billion in 2025 and is projected to hit USD 9.01 billion by 2030 at an 8.54% CAGR.

Which launch platform segment is expanding the quickest?

Missiles launched from UAVs are forecasted to grow at an 11.25% CAGR through 2030.

Why are long-range missiles gaining traction?

Advanced air defenses are pushing strike requirements beyond 400 km, driving a 10.42% CAGR in the long-range segment.

What propulsion technology underpins hypersonic weapons?

Dual-mode ramjet and scramjet engines enable sustained flight above Mach 5 while remaining producible at scale.

Which guidance technologies best resist electronic-warfare jamming?

Multi-mode seekers that fuse radar, imaging infrared, and laser inputs maintain accuracy even when GPS or datalinks are disrupted.

Which region shows the highest growth potential?

Asia-Pacific is projected to lead with a 10.75% CAGR as regional defense budgets prioritize indigenous long-range strike capabilities.