

North America Non-Lethal Weapons Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 85 pages | Mordor Intelligence

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Report description:

The North American non-lethal weapons market is estimated to register a CAGR of over 3% during the forecast period.

The outbreak of the COVID-19 pandemic has not substantially affected the non-lethal weapons market's growth. In several countries, non-lethal weapons were employed to dissolve the crowd during the lockdowns. In 2021, Protests associated with Capitol attacks and racial unrest heightened the purchase of non-lethal weapons in the United States, the largest market for non-lethal weapons.

Increasing political tensions and armed violence have resulted in governments worldwide taking provisions and equipping the military and the police forces with non-lethal weapons. Occurrences of civilian violence and clashes with armed forces in the North American region have led to the deployment of non-lethal weapons. The growth in riots in the region might drive the demand for non-lethal weapons as law enforcement agencies try to decrease fatalities and casualties in such incidents, which may help the market during the forecast period.

Furthermore, technological advancements, in terms of non-lethal weapons, by various players across several countries in the region are expected to provide growth opportunities for the market during the forecast period.

North America Non Lethal Weapons Market Trends

The Ammunition Segment is Expected to Register the Highest CAGR During the Forecast Period

Currently, the ammunition segment has the highest share out of all the segments. Technological advancements in non-lethal

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weapon technologies are expected to increase demand for related ammunition such as rubber bullets, bean bag rounds, and smoke munitions in the region. Non-lethal weapons, such as rubber bullets and tear gas, have become standard tools for the police forces to control civilian protests. The law enforcement agencies use tactics and tools, such as handheld impact weapons (police batons, expandable batons, nunchakus), tasers and other electronic stun devices, and chemical agents, such as OC and CS, to subdue combative subjects and protect themselves and others from a potential threat. The effective use of such options requires officers to be near their opponent, which increases the risk to officers and, thus, presents the possibility that an altercation may escalate to a point where deadly force becomes necessary. Hence, to reduce the likelihood of such an altercation, law enforcement agencies are rapidly adopting high-impact ammunition, such as wooden dowels, foam rubber projectiles, and small bean bags, to disperse the violent crowd from a distance. For instance, in April 2021, the city of Pittsburgh requested a Formal Invitation for Bids of various less-lethal weapons for the Pittsburgh Police force. The request included thousands of projectile beanbags, hundreds of sponge rounds, dozens of tear gas canisters, and other less-lethal weapons. Such ongoing advancements and procurements of ammunition for less-lethal weapons are expected to boost the growth of this segment.

The United States is Expected to Experience the Highest Growth

The North American non-lethal weapons market is driven by an increase in violence-related incidents in the United States and the subsequent demand for non-lethal weapons by law enforcement agencies to contain the situation effectively. Moreover, growing issues regarding personal safety may lead to the growth of the non-lethal weapons market in the United States. Additionally, the US Department of Defence (DoD) is now focusing on developing non-lethal weapons to minimize the probability of fatalities and permanent injuries. The use of non-lethal weapons by the US Army is increasing as they are essential in places where the army cannot engage targets that are located or positioned such that the application of lethal, destructive fires is prohibitive or would be counter-productive to the initial goal and objective. The Joint Intermediate Force Capabilities Office is currently working on inducting a kit for the standard remotely operated weapon station (CROWS) with laser or acoustic device, production of 81mm flashbang munition for the US Marine Corps., and millimeter-wave active denial systems, among others. Such investments of law enforcement authorities and armed forces for developing and deploying non-lethal weapons are expected to drive the growth of this market during the forecast period.

North America Non Lethal Weapons Market Competitor Analysis

The market for North American non-lethal weapons is slightly fragmented, with several players providing various types of less-lethal weapons to military and law-enforcement agencies. Some prominent North American non-lethal weapons market players are Lamperd Inc., Pepperball Technologies Inc., Genasys Inc., Axon Enterprise Inc., and Safariland LLC. To increase the market share, the companies are implementing merges and acquisition strategies by acquiring companies that complement their existing product portfolio. For instance, Byrna Technologies Inc. announced that the company completed the acquisition of Mission Less Lethal from Kore (US) Outdoor Inc. in May 2021. Mission Less Lethal is one of the US-based manufacturers of shoulder-fired .68 caliber non-lethal launchers for law enforcement and other security agencies. The companies are also introducing product innovation initiatives to strengthen their market presence. On this note, in May 2022, Verus Research received a small business innovative research (SBIR) contract from the US Department of Defence Joint Intermediate Force Capabilities Office (JIFCO) that provided funds to develop broadband counter-electronics weapon (BCEW). The BCEW is a long-range non-lethal weapon that is expected to be used for stopping vehicles and vessels. Such agreements for developing new less-lethal weapons are expected to help the companies increase their regional footprint.

Additional Benefits:

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

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