

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

Market Report | 2023-01-23 | 147 pages | Mordor Intelligence

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### **Report description:**

The non-lethal weapons industry is anticipated to register a CAGR of 4.34% during the forecast period (2022-2027). The market is expected to grow from USD 4.54 billion in 2021 to USD 5.89 billion in 2027.

The outbreak of the COVID-19 pandemic has not significantly impacted the non-lethal weapons market's growth. In several countries, non-lethal weapons were used to disperse the crowd during the lockdowns. Protests related to racial unrest and Capitol attacks increased the purchase of non-lethal weapons in the United States, the largest market for non-lethal weapons.

Increasing armed violence and political tensions have resulted in governments worldwide taking precautions and arming the military and the police forces with non-lethal weapons. Instances of civilian violence and clashes with armed forces in the North American and the Asia-Pacific region have led to the deployment of non-lethal weapons.

These factors may continue to drive the demand for non-lethal weapons, as law enforcement agencies try to reduce fatalities and casualties in such events, which may help the market during the forecast period.

Lack of proper training on the use of non-lethal weapons has resulted in serious injuries. Restrictions on the use of non-lethal weapons by the governments and objections raised by human rights organizations have acted as a barrier to the full-scale adoption of non-lethal weapons.

Significant work on electroshock and directed energy weapons is underway, which is expected to bring a revolution in the field of non-lethal weapons in the future.

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### The Military Segment to Exhibit the Highest Growth Rate During the Forecast Period

Although law enforcement agencies are avid users of non-lethal weapons currently, the role of armed forces or the military has changed significantly in recent years. Their involvement in policing the civilian populations has increased. In today's world, military units are involved in ongoing international conflicts that bring them into direct contact with civilian populations. Soldiers deployed in humanitarian roles are subject to strict rules of engagement threat. This has generated the need for less lethal bullets and ammunition for use in perimeter security, crowd and riot control, and pilfering situations. Militaries are prepared to operate in the MOOTW (Military Operations Other Than War), where the use of lethal force is not permissible. With rubber bullets, batons, foam, bean bag rounds, and sponges failing to serve their less-lethal purpose effectively, there is a growing demand for weapons that can fulfill the goal of pain compliance without the risk of fatality.

The US Army recently introduced a new non-lethal weapon to support its soldiers in Afghanistan. PepperBall Technologies developed a new weapon known as the Variable Kinetic System (VKS). The weapon fires projectiles like paintballs containing a hot pepper solution. The projectiles have a range of around 50 yards, and the irritant contains 5% pelargonic acid vanillylamide (PAVA), along with a synthetic version of pepper spray. The weapon can carry up to 180 rounds in hopper mode. The Army awarded a USD 650,000 contract for the weapons and purchased 267 of the weapons that are currently used for training. Several other non-lethal weapons applications are being developed for the military. These include acoustic, microwave, infrared, radio frequency-based, and laser technologies. The development of such technologies is expected to drive the prospects of the segment in focus.

### Asia-Pacific will Register the Highest Growth Rate During the Forecast Period

The Asia-Pacific region's growth is expected to be the highest during the forecast period. With the escalating tensions along the borders and protests all over the country during the past few years, India's demand for less-lethal weapons increased. Occasional riots and civil unrest in other countries, such as demonstrations and protests in cities in Eastern China, often in connection with labor-related, environmental, and educational issues, have led to the police forces resorting to the use of non-lethal ammunition, which, collectively, may have a positive impact on the growth of the market. India's Border Security Force (BSF) uses various non-lethal weapons at the India-Bangladesh border to stop cross-border smuggling and illegal migration. Other armed forces in India, such as the Navy, Military, and Airforce, also use non-lethal weapons for various applications, considering their effectiveness. For instance, in December 2020, Bharat Electronics Limited signed a contract with the Indian Navy to supply 20 laser dazzlers. During the Hong Kong protest in 2020, police forces in China fired teargas to control the crowd gathered against Beijing's national security law. Players in the region are also developing newer non-lethal weapon systems for various end-users. For instance, in October 2021, Apastron Pvt Ltd, an Indian firm, announced that it developed non-lethal weapons for security forces inspired by traditional Indian weapons used in man-to-man combat. Such increased use of non-lethal weapons is expected to generate demand for new non-lethal weapons during the forecast period.

### Non-lethal Weapons Market Competitor Analysis

The non-lethal ammunition market is highly fragmented, with a handful of players representing conventional non-lethal weapons. There are numerous manufacturers funded and supported by the government domestically capable of serving both sudden and long-term demands. Most of these manufacturers produce all types of explosives and ammunition (both lethal and non-lethal) for the military and law enforcement. Thus, they can increase focus on certain ammunition and improve production rate on short notice, as the supply chain is completely localized and supported by government funding and logistics. AMTEC Less lethal, Axon Enterprise, Lamperd Less Lethal, Rheinmetall AG, and Defense Technology were some of the major players, together accounting for a significant market share. Mergers and acquisitions between the market players in the recent past have helped the

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companies strengthen their market presence.

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