

## **Counter-led Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 92 pages | Mordor Intelligence

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### **Report description:**

The counter-IED market is poised to register a CAGR of over 2% during the forecast period (2022 - 2031).

The impact of the COVID-19 pandemic on the counter-IED market is negligible as the investments of governments into the protection of their personnel against improvised explosive devices (IEDs) have remained unaffected.

The increasing incidences of terror attacks involving improvised explosive device blasts across the world as well as growth in asymmetric warfare, which is expected to increase the usage of IEDs, is expected to propel the procurement of counter IED devices by the law enforcement and armed forces of various countries.

The increasing investments in the development and introduction of technologically advanced detection and counter IED systems are expected to boost the growth of the market in the years to come.

### Counter IED Market Trends

#### The Vehicle-mounted Segment Accounts for the Largest Share in the Market

Currently, the vehicle-mounted segment has the largest share in the counter-IED market. This demand is attributed to growing investments of the armored forces around the world into procurement and integration of vehicle-mounted counter IED systems into the land, air, and sea platforms. For instance, in April 2020, the Netherlands Defence Material Organisation (DMO) placed an order to Saab for procurement of the Sea Wasp vehicle. Sea Wasp is a remote-operated underwater vehicle that is equipped with cameras and sonar systems to detect underwater explosive ordnance disposal (EOD) and the manipulator arm used for disruption of the explosive. With this contract, the Netherlands became the first European customer to acquire the Sea Wasp vehicle. Moreover, there was substantial growth in the procurements of unmanned systems for counter-IED operations. Many countries are developing their indigenous unmanned systems for counter-IED operations, keeping in mind the aspects of personnel protection in

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case of IED blasts during detection and countermeasure phases. Over the past five years, many land forces have introduced unmanned ground vehicles to assist in safe explosive disposal and decrease the number of soldier fatalities. Such disruptions in technology are anticipated to accelerate the growth of the market during the forecast period.

#### North America Registered the Largest Market Share in 2021

North America currently dominates the market and is expected to continue its dominance over the market during the forecast period. This is primarily due to the highest military spending of the United States, which accounts for about 39% of the global military expenditure in 2020. The country has been expanding its fleet of manned and unmanned systems that will help its military personnel clear IEDs and other unexploded explosives more efficiently. For instance, in February 2022, the US Air Force announced its plan to deploy the Recovery of Airbase Denied By Ordnance (RADBO) vehicle, a vehicle based on the Cougar Mine Resistant Ambush Protected vehicle (MRAP) from mid-2022. The vehicle was developed with an investment of USD 40 million and had a robotic arm and three-kilowatt Zeus III laser that is capable of detonating unexploded bombs. The US Air Force is also in plans to acquire additional 21 vehicles in the coming years. Also, Under the Man Transportable Robotic System Increment II (MTRS Inc II), the US Army is acquiring unmanned ground vehicles to support Engineers, Chemical, Biological, Radiological, and Nuclear (CBRN) Soldiers, and Special Operations Forces. The new UGVs are replacing the aging non-standard fleet of robots for locating, identifying, and clearing landmines, unexploded ordnance, and improvised explosive devices, which may enhance the maneuverability and survivability of the military personnel. Under the MTRS Inc II has been acquiring Centaur unmanned ground vehicles since 2017. Such procurements by the armed forces is anticipated to propel the growth of the market in the coming years.

#### Counter IED Market Competitor Analysis

Lockheed Martin Corporation, L3Harris Technologies Inc., Elbit Systems Ltd, Northrop Grumman Corporation, and Thales Group are some of the prominent players in the counter-IED market. To increase their foothold in the market, the companies are investing in the research and development of new products and solutions that will effectively detect the IEDs and dismantle them more securely. In this regard, in February 2022, DroneShield Limited, a counter unmanned aerial systems (UAS) provider, and Allen-Vanguard, a manufacturer of counter-improvised explosive devices (IED) entered into a partnership to explore the development of new products and also market an integrated counter-UAS and counter-IED system to their customers. Such partnership among the players to introduce new products in the market with additional capabilities is anticipated to support the companies expand their geographic presence. Also, the focus is being shifted to the use of unmanned systems for counter-IED operations. Players can focus on producing autonomous products compatible with unmanned systems, which may help them to sustain in the changing market landscape.

#### Additional Benefits:

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

#### **Table of Contents:**

##### 1 INTRODUCTION

##### 1.1 Study Assumptions

##### 1.2 Scope of the Study

##### 1.3 Currency Conversion Rates for USD

##### 2 RESEARCH METHODOLOGY

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### 3 EXECUTIVE SUMMARY

- 3.1 Market Size and Forecast, Global, 2018 - 2031
- 3.2 Market Share by Type, 2021
- 3.3 Market Share by Geography, 2021
- 3.4 Structure of the Market and Key Participants

### 4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
- 4.3 Market Restraints
- 4.4 Industry Attractiveness - Porter's Five Forces Analysis
  - 4.4.1 Threat of New Entrants
  - 4.4.2 Bargaining Power of Buyers/Consumers
  - 4.4.3 Bargaining Power of Suppliers
  - 4.4.4 Threat of Substitute Products
  - 4.4.5 Intensity of Competitive Rivalry

### 5 MARKET SEGMENTATION (Market Size and Forecast by Value - USD million, 2018 - 2031)

- 5.1 Capability
  - 5.1.1 Detection
  - 5.1.2 Countermeasures
- 5.2 Deployment
  - 5.2.1 Vehicle-mounted
    - 5.2.1.1 Manned Vehicles
    - 5.2.1.2 Unmanned Vehicles
  - 5.2.2 Hand-held
- 5.3 Geography
  - 5.3.1 North America
  - 5.3.2 Europe
  - 5.3.3 Asia-Pacific
  - 5.3.4 Latin America
  - 5.3.5 Middle-East

### 6 COMPETITIVE LANDSCAPE

- 6.1 Vendor Market Share
- 6.2 Company Profiles
  - 6.2.1 Lockheed Martin Corporation
  - 6.2.2 L3Harris Technologies Inc.
  - 6.2.3 Elbit Systems Ltd
  - 6.2.4 Northrop Grumman Corporation
  - 6.2.5 Thales Group
  - 6.2.6 Saab AB
  - 6.2.7 Raytheon Technologies Corporation
  - 6.2.8 Chemring Group PLC
  - 6.2.9 Allen-Vanguard Corporation
  - 6.2.10 Israel Aerospace Industries Ltd
  - 6.2.11 QinetiQ Group PLC

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6.2.12 Rheinmetall AG

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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