

Combat Helmet - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The combat helmet market is anticipated to increase from USD 2.47 billion in 2024 to USD 3.52 billion in 2029, registering a CAGR of 7.31% during the forecast period (2024-2029).

The focus on soldier modernization is currently driving the market, as the military focuses on replacing the existing soldier protection and situational awareness systems. In this regard, they are procuring newer helmets that are lighter, stronger, and more technologically advanced for military personnel. Several countries continued to invest significant amounts into developing and procuring newer generation combat helmet systems in their militaries. The use of lightweight materials, such as plastic, allows the helmet designers to integrate more accessories, such as night vision and thermal vision headsets, communication headsets, combat visors, adapters and cables, and mandible guards, on the helmet.

However, the stringent conformation standards set by regulatory bodies in various countries require players to invest more into developing the newer generation combat helmets, thus increasing their cost of R&D.

Combat Helmet Market Trends

Ballistic Fiber Helmets Segment is Expected to Dominate the Market

The ballistic fiber helmets segment is expected to lead the market growth during the forecast period owing to the advantages of ballistic fiber over other types of helmets. In addition, the increasing strength of military personnel across various countries is driving the demand for advanced variants of combat helmets. Typically made from high-strength, lightweight fibrous materials such as Kevlar and carbon fiber, military ballistic helmets are designed to withstand ballistic impacts, including penetration of

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bullets, as well as protection against shrapnel from explosives or other fragmentation sources.

Key players in the market highly focus on the design and development of ballistic helmets for the military forces. ArmorSource introduced its next-generation Aire System, a helmet that offers six different shells that use new lightweight materials. In addition to the shells, the system includes an ultra-lightweight helmet mount and multiple helmet accessories designed to provide maximum protection and comfort. Previously, in March 2021, research was performed in the Helmet Laboratory at the United States Army Combat Capabilities Development Command to develop new lightweight combat helmets that provide warfighter protection against a higher-level threat. Such technological developments, combined with increased demand from various countries, are expected to drive this segment of the market.

Asia-Pacific to Exhibit the Highest Growth Rate During the Forecast Period

Asia-Pacific is projected to show remarkable growth during the forecast period. The growth is attributed to the increasing military expenditure and procurements of ballistic helmets and accessories from countries like India, China, and South Korea. India spent a total of USD 81.4 billion on military expenditure in 2022 and invested in developing new-age ballistic helmets. In February 2022, the Indian Army ordered 80,000 new ballistic helmets to protect troops against high-velocity bullets. These helmets are made of various composite materials and are lighter and stronger. Similarly, to accommodate the turban of India's Sikh soldiers, in February 2022, MKU Limited announced the development of the Kavro SCH 111 T special ballistic helmet. This helmet offers level IIIA protection to the soldier's head from ballistic threats and fragments.

Furthermore, integrating smart technologies into helmets is used in numerous applications across the Asia-Pacific region. For instance, in China, law enforcement agencies are being equipped with smart helmets developed by Kuang-Chi Technology that can detect body temperature and assist in the containment of the spread of COVID-19. The helmet features pre-installed Wi-Fi and 5G technology that efficiently integrates and enhances communication and data sharing. Several such procurements and technological integrations are expected to drive the market with a significant growth rate during the forecast period.

Combat Helmet Industry Overview

The combat helmet market is moderately fragmented, with the presence of several players holding significant shares in the market. ArmorSource LLC, 3M Company, Honeywell International Inc., Revision Military Inc., and DuPont de Nemours Inc. are some of the prominent players in the market studied. With the increasing demand for smart helmets and ballistic helmets that can withstand any adversary's high-velocity bullet rounds or armor-piercing rounds, several companies are now focusing on the use of advanced materials and innovative design elements. It is to make the helmets more effective, thereby attracting customers.

Companies are also working to modernize the standard-issue military helmets by integrating the latest technology to save lives on the battlefield. For instance, in October 2021, the Austrian helmet manufacturer Ulbrichts unveiled its latest rifle helmet, claiming that it shields against Kalashnikov and AR-15 rounds. According to the company, the titanium-composite helmet restricts the residual energy released upon a bullet impact from more than 2,000 joules to well below the survivable 25 joules. Such developments are expected to drive the growth of the players in the market during the forecast period.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
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