

Non-Lethal Weapons Market Assessment, By Type [Area Denial, Ammunition, Explosives, Gases and Sprays, Directed Energy Weapons, Electroshock Weapons], By Application [Law Enforcement, Military], By Region, Opportunities and Forecast, 2017-2031

Market Report | 2024-04-19 | 210 pages | Market Xcel - Markets and Data

AVAILABLE LICENSES:

- Single User License \$4500.00
- Multi-User/Corporate Licence \$5700.00
- Custom Research License \$8200.00

Report description:

Global non-lethal weapons market size was valued at USD 8.51 billion in 2023, expected to reach USD 13.91 billion in 2031, with a CAGR of 6.33% for the forecast period between 2024 and 2031. The non-lethal weapons market encompasses a range of devices designed to incapacitate or deter without causing fatal harm. It includes items such as stun guns, tear gas, rubber bullets, and acoustic weapons. Driven by increasing concerns about public safety and law enforcement tactics, the non-lethal weapons market has seen growth in recent years. The development and adoption of innovative technologies aim to provide effective alternatives to traditional lethal force options.

The non-lethal weapons market has experienced steady growth due to rising concerns about civil unrest and law enforcement tactics globally. An ongoing trend is the integration of advanced technologies like electroshock weapons and directed energy systems for enhanced effectiveness. A challenge in the market involves addressing ethical and legal concerns surrounding the use of non-lethal weapons. An opportunity area lies in the development of more sophisticated and non-intrusive technologies to minimize unintended consequences and expand the market's applicability in diverse scenarios. Overall, the market is poised for further expansion with increased emphasis on research and development.

Focus on Reducing Civilian Casualties in Riots

Rising cases of civil unrest and riots across the world are significantly driving the growth of the market. In 2023, there were significant cases of civil unrest and riots reported in various parts of the world. For instance, according to Verisk Maplecroft, The Civil Unrest Index indicates a notable rise in risk across 36 African countries between the second quarter of 2022 and the same period in 2023. It marks the most substantial annual increase in the region in 2017. Consequently, the count of African countries categorized as high or extreme risk for civil unrest has surged to 37, compared to 28, six years ago. In Europe, France

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

experienced riots in 2023, with instances of extreme violence and protests police actions, leading to significant social tension and calls for tougher measures against rioters.

Thus, the growth of the non-lethal weapons market is significantly driven by the heightened global emphasis on human rights and the reduction of civilian casualties during riots. The drive is intricately linked to ethical and moral considerations surrounding the use of force in law enforcement, military endeavors, and riot control. Governments, international bodies, and the public have become increasingly aware of the imperative to safeguard human rights and minimize harm to civilians, during situations requiring the use of force.

The utilization of lethal force can often lead to unintended casualties and substantial human rights issues, prompting a rising demand for alternative methods to mitigate such risks. Non-lethal weapons offer a practical solution by incapacitating, deterring, or immobilizing targets without causing fatal injuries, striking a balance between verbal warnings and lethal force. These weapons provide security forces with an effective means to maintain public order, handle conflicts, and respond to threats while reducing the likelihood of civilian casualties. The growing emphasis on human rights and civilian protection has compelled governments and security agencies worldwide to integrate non-lethal weapons into their operational strategies. Law enforcement agencies, military forces, and peacekeeping missions globally acknowledge the value of non-lethal options in adhering to human rights standards and upholding public trust.

Increasing Government Defense Budgets

The surge in government defense budgets worldwide is a key driver fueling the demand for the global non-lethal weapons market. As nations confront evolving security threats and geopolitical tensions, there's a heightened emphasis on bolstering military capabilities. The increased allocation of funds to defense is spurred by events like the Russia-Ukraine and Israel-Hamas conflicts. With a 3.7% real-term rise in global military expenditure in 2022, reaching a record USD 2,240 billion, the United States, China, and Russia, comprising 56% of the total, were the top spenders. Europe witnessed its most substantial year-on-year increase in military spending in at least 30 years. Asia and Oceania spent USD 575 billion combined, with China as the second-largest spender at USD 292 billion.

Notably, Saudi Arabia in the Middle East and Africa raised spending by 16% to USD 75 billion. The escalating investment in defense is creating a robust demand for non-lethal weapons as security forces seek effective and ethical tools for maintaining public order, handling conflicts, and responding to threats while minimizing the risk of civilian casualties.

Military Application to Drive Significant Demand

The rise in defense spending globally, coupled with an escalation in border disputes and frequent civilian-police and military clashes, where military personnel come into direct contact with civilians, are primary factors driving various countries to acquire non-lethal weapons. The trend is expected to contribute to the market's growth in the near future. The current surge in violent clashes worldwide has increased police and, at times, military involvement.

Soldiers engaged in humanitarian roles face strict rules of engagement, necessitating less-lethal ammunition for applications like perimeter security, crowd control, and riot situations. The demand for non-lethal weapons has intensified as traditional options such as rubber bullets, batons, foam, bean bag rounds, and sponges prove ineffective in achieving pain compliance without the risk of fatality.

Military arsenals include diverse non-lethal weapons, such as the M5 modular crowd control munition, Pulsed Energy Projectile, Plasma Acoustic Shield System, shotgun tasers, 40 mm sponge grenades, rubber ball hand grenades, and High-Capacity Oleoresin Capsicum Dispensers, catering to different scenarios. The evolving landscape of unconventional warfare, where fighters operate among civilians, has prompted NATO to organize a Non-Lethal Technology Exercise in September 2016. Belgium hosted the exercise to practice and evaluate the military utility of non-lethal weapons in land operations. Furthermore, there is an upswing in global investments dedicated to the research and development of advanced non-lethal weapons for military applications.

Impact of COVID-19

The COVID-19 pandemic impacted the non-lethal weapons market by disrupting supply chains, causing delays in manufacturing, and affecting demand due to economic uncertainties. Governments reallocating budgets toward healthcare and pandemic-related measures posed a challenge to the market's growth. However, increased civil unrest led to a surge in the demand for non-lethal crowd control solutions, presenting an opportunity for market recovery. The focus was on remote and autonomous technologies, which emerged as a trend, reflecting the need for contactless security measures amid the ongoing health crisis. Overall, the

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

pandemic created a complex landscape with both challenges and opportunities for the non-lethal weapons market.

Key Players Landscape and Outlook

Market players in non-lethal weapons market pursue frequent product launches and innovation to stay competitive and address evolving market demands. By regularly introducing new and advanced products, companies seek a competitive edge, differentiating themselves and attracting attention in a competitive market. The rapid pace of technological advancements allows these players to enhance the capabilities of their offerings, ensuring they remain aligned with changing security needs and regulatory standards. Additionally, proactive innovation enables companies to address specific market needs, expand their market reach, and build a positive brand image, contributing to long-term sustainability and success in the dynamic non-lethal weapons industry.

For instance, in January 2022, KWESST Micro Systems Inc. announced the launch of its non-lethal product, the Low Energy Cartridge System under the brand name Para Ops. The strategic move aims to redefine the non-lethal personal defense category and have a transformative impact on the broader law enforcement industry. By introducing innovative solutions, such as the Low Energy Cartridge System, companies seek to cater to the growing demand for effective, ethical, and advanced non-lethal technologies, thereby expanding their market presence and meeting the evolving requirements of security forces and law enforcement agencies.

Table of Contents:

1. Research Methodology
2. Project Scope & Definitions
3. Impact of COVID-19 on Global Non-Lethal Weapons Market
4. Executive Summary
5. Voice of Customer
 - 5.1. Factors Considered in Purchase Decision
 - 5.1.1. Capability and Performance
 - 5.1.2. Cost-Effectiveness
 - 5.1.3. Reliability and Quality
 - 5.1.4. Compliance with Regulations
 - 5.1.5. Flexibility and Customization
6. Global Non-Lethal Weapons Market Outlook, 2017-2031F
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value
 - 6.2. By Type
 - 6.2.1. Area Denial
 - 6.2.2. Ammunition
 - 6.2.3. Explosives
 - 6.2.4. Gases and Sprays
 - 6.2.5. Directed Energy Weapons
 - 6.2.6. Electroshock Weapons
 - 6.3. By Application
 - 6.3.1. Law Enforcement
 - 6.3.2. Military
 - 6.4. By Region
 - 6.4.1. North America
 - 6.4.2. Europe
 - 6.4.3. South America
 - 6.4.4. Asia-Pacific
 - 6.4.5. Middle East and Africa

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.5. By Company Market Share (%), 2023
- 7. Global Non-Lethal Weapons Market Outlook, By Region, 2017-2031F
 - 7.1. North America*
 - 7.1.1. Market Size & Forecast
 - 7.1.1.1. By Value
 - 7.1.2. By Type
 - 7.1.2.1. Area Denial
 - 7.1.2.2. Ammunition
 - 7.1.2.3. Explosives
 - 7.1.2.4. Gases and Sprays
 - 7.1.2.5. Directed Energy Weapons
 - 7.1.2.6. Electroshock Weapons
 - 7.1.3. By Application
 - 7.1.3.1. Law Enforcement
 - 7.1.3.2. Military
 - 7.1.4. United States*
 - 7.1.4.1. Market Size & Forecast
 - 7.1.4.1.1. By Value
 - 7.1.4.2. By Type
 - 7.1.4.2.1. Area Denial
 - 7.1.4.2.2. Ammunition
 - 7.1.4.2.3. Explosives
 - 7.1.4.2.4. Gases and Sprays
 - 7.1.4.2.5. Directed Energy Weapons
 - 7.1.4.2.6. Electroshock Weapons
 - 7.1.4.3. By Application
 - 7.1.4.3.1. Law Enforcement
 - 7.1.4.3.2. Military
 - 7.1.5. Canada
 - 7.1.6. Mexico
- *All segments will be provided for all regions and countries covered
- 7.2. Europe
 - 7.2.1. Germany
 - 7.2.2. France
 - 7.2.3. Italy
 - 7.2.4. United Kingdom
 - 7.2.5. Russia
 - 7.2.6. Netherlands
 - 7.2.7. Spain
 - 7.2.8. Turkey
 - 7.2.9. Poland
- 7.3. South America
 - 7.3.1. Brazil
 - 7.3.2. Argentina
- 7.4. Asia-Pacific
 - 7.4.1. India
 - 7.4.2. China

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 7.4.3. Japan
- 7.4.4. Australia
- 7.4.5. Vietnam
- 7.4.6. South Korea
- 7.4.7. Indonesia
- 7.4.8. Philippines
- 7.5. Middle East & Africa
- 7.5.1. Saudi Arabia
- 7.5.2. UAE
- 7.5.3. South Africa
- 8. Market Mapping, 2023
- 8.1. By Type
- 8.2. By Application
- 8.3. By Region
- 9. Macro Environment and Industry Structure
- 9.1. Supply Demand Analysis
- 9.2. Import Export Analysis
- 9.3. Value Chain Analysis
- 9.4. PESTEL Analysis
- 9.4.1. Political Factors
- 9.4.2. Economic System
- 9.4.3. Social Implications
- 9.4.4. Technological Advancements
- 9.4.5. Environmental Impacts
- 9.4.6. Legal Compliances and Regulatory Policies (Statutory Bodies Included)
- 9.5. Porter's Five Forces Analysis
- 9.5.1. Supplier Power
- 9.5.2. Buyer Power
- 9.5.3. Substitution Threat
- 9.5.4. Threat from New Entrant
- 9.5.5. Competitive Rivalry
- 10. Market Dynamics
- 10.1. Growth Drivers
- 10.2. Growth Inhibitors (Challenges and Restraints)
- 11. Key Players Landscape
- 11.1. Competition Matrix of Top Five Market Leaders
- 11.2. Market Revenue Analysis of Top Five Market Leaders (in %, 2023)
- 11.3. Mergers and Acquisitions/Joint Ventures (If Applicable)
- 11.4. SWOT Analysis (For Five Market Players)
- 11.5. Patent Analysis (If Applicable)
- 12. Pricing Analysis
- 13. Case Studies
- 14. Key Players Outlook
- 14.1. AMTEC Less-Lethal Systems Inc.
- 14.1.1. Company Details
- 14.1.2. Key Management Personnel
- 14.1.3. Products & Services

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

14.1.4.□Key Market Focus & Geographical Presence

14.1.5.□Financials (As Reported)

14.1.6.□Recent Developments

14.2.□Combined Systems, Inc. (CSI)

14.3.□Fiocchi Munizioni S.p.A.

14.4.□Herstal Group

14.5.□ISPRA

14.6.□Lamperd Less Lethal

14.7.□Byrna Technologies Inc.

14.8.□NonLethal Technologies, Inc

14.9.□UTS United Tactical Systems, LLC (Pepperball)

14.10.□RTX Corporation

*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

15.□Strategic Recommendations

16.□About Us & Disclaimer

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Non-Lethal Weapons Market Assessment, By Type [Area Denial, Ammunition, Explosives, Gases and Sprays, Directed Energy Weapons, Electroshock Weapons], By Application [Law Enforcement, Military], By Region, Opportunities and Forecast, 2017-2031

Market Report | 2024-04-19 | 210 pages | Market Xcel - Markets and Data

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4500.00
	Muti-User/Corporate Licence	\$5700.00
	Custom Research License	\$8200.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2025-05-07

Signature



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com