

Military Helmet And Helmet Mounted Display Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Military Helmet And Helmet Mounted Display Systems Market size is estimated at USD 6.22 billion in 2025, and is expected to reach USD 7.67 billion by 2030, at a CAGR of 4.27% during the forecast period (2025-2030).

Rising global security threats and heightened public investments in modernization are driving the demand for advanced combat systems. This demand is further bolstered by the need for helmet-mounted displays, which enhance situational awareness, and the urgent requirement for enhanced head protection in combat zones. Technological advancements in this sector are evident in augmented reality, night vision capabilities, and seamless integration with communication systems.

Material science advancements are pivotal in crafting lighter and stronger helmets without compromising protection. These helmets offer protection, real-time health monitoring, and enhanced battlefield management by incorporating IoT and biometric sensors, ensuring optimal soldier well-being and performance. As military spending escalates, a notable portion is channeled into enhancing troop safety and situational awareness, further fueling the growth of the helmet-mounted display (HMD) systems market. However, the preference for conventional warfare systems in developing countries and safety issues in military helmets are expected to hamper the market's growth.

Military Helmet And Helmet Mounted Display Systems Market Trends

Helmet Mounted Displays Segment is Expected to Witness Significant Growth During the Forecast Period

An HMD device projects visual information directly to soldiers' eyes, enhancing their situational awareness, especially in scenarios where head protection is crucial. Integrated into the helmet's design, the display optics assembly offers military pilots an

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augmented view of their surroundings. It is vital for split-second decision-making, often a matter of life and death. By recognizing this, military entities globally are investing heavily in advanced HMD systems.

Rising cross-border conflicts, political tensions, and the specter of terrorism have underscored the need for bolstered defense capabilities. This has translated into heightened defense spending and an expansion of military forces, driving the demand for sophisticated helmet-mounted displays, especially with the increasing number of military personnel.

Collins Aerospace and Elbit Systems Ltd. collaborated to develop a cutting-edge third-generation HMD for the US Navy. This system seamlessly integrates a helmet-mounted display, head-up display (HUD), and visor-projected night vision, empowering fighter pilots with enhanced targeting capabilities and superior situational awareness.

For instance, in December 2023, the US Navy avionics division revealed its plans to procure a production lot of third-generation helmet-mounted displays for Lockheed Martin Corporation's F-35 Lightning II joint strike fighter, with the contract valued at approximately USD 174.6 million. This followed a USD 347.4 million order placed in August 2022 for production lots 15 and 16 of the F-35 helmet-mounted display. These advancements have enhanced the capabilities of HMDs and opened up new avenues for their application, driving the market's growth.

Asia-Pacific is Expected to Register the Fastest Growth During the Forecast Period

In recent years, there has been significant growth in cross-border conflicts, warfare situations, and political disputes among neighboring countries in Asia-Pacific. India, China, Japan, and South Korea increased their defense expenditures to improve defense capabilities and procure advanced helmets for fighter jet pilots and army personnel. The Stockholm International Peace Research Institute (SIPRI) report stated that in 2023, China ranked as the world's second-largest military spender, allocating a substantial USD 296 billion. India was the fourth largest defense spender, with a defense expenditure of USD 83.6 billion. With a global emphasis on personnel safety, the demand for helmets and related technologies continues to increase.

Furthermore, the increased adoption of technologically advanced helmets, helmet-mounted displays, and a growing number of military personnel are driving the market's growth. For instance, in November 2023, MKU Limited, an Indian defense company, launched its latest personal soldier product, the Kavro Doma 360 lightweight ballistic helmet. The helmet weighs a minimum of 1.45 kg and has several features designed to provide military personnel comfort and protection. Thus, the increasing procurement of next-generation helmets and accessories and the growing focus on enhancing soldiers' security are expected to boost the market's growth across the region.

Military Helmet And Helmet Mounted Display Systems Industry Overview

The military helmets and helmet mounted display systems market is semi-consolidated, with a few players holding significant shares. Some of the key players in the market are RTX Corporation, THALES, 3M, BAE Systems PLC, and Honeywell International Inc. Key OEMs are highly investing in developing next-generation helmet-mounted displays that would improve soldiers' safety.

For instance, in August 2023, Collins Elbit Vision Systems (CEVS) received a two-year contract worth USD 16.8 million from the US Navy to update a head-worn device that allows fighter pilots to cue aircraft weapons and sensors for target acquisition. Under the contract, the company will develop, engineer, and test the Improved Joint Helmet Mounted Cueing System. Also, in July 2022, Elbit Systems Ltd launched an innovative technological vision suite for military helicopters. The new suite integrates a sensor array, a unique helmet-mounted display (HMD) system, and an artificial intelligence (AI)- powered mission computer.

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- The market estimate (ME) sheet in Excel format
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Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions & Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
- 4.3 Market Restraints
- 4.4 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

- 5.1 Type
 - 5.1.1 Helmets
 - 5.1.2 Helmet Mounted Displays
 - 5.1.3 Accessories
- 5.2 Geography
 - 5.2.1 North America
 - 5.2.1.1 United States
 - 5.2.1.2 Canada
 - 5.2.2 Europe
 - 5.2.2.1 United Kingdom
 - 5.2.2.2 Germany
 - 5.2.2.3 France
 - 5.2.2.4 Russia
 - 5.2.2.5 Rest of Europe
 - 5.2.3 Asia-Pacific
 - 5.2.3.1 China
 - 5.2.3.2 India
 - 5.2.3.3 Japan
 - 5.2.3.4 South Korea
 - 5.2.3.5 Rest of Asia-Pacific
 - 5.2.4 Latin America
 - 5.2.4.1 Brazil
 - 5.2.4.2 Rest of Latin America

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- 5.2.5 Middle East and Africa
 - 5.2.5.1 Saudi Arabia
 - 5.2.5.2 United Arab Emirates
 - 5.2.5.3 Israel
 - 5.2.5.4 Rest of Middle East and Africa

6 COMPETITIVE LANDSCAPE

- 6.1 Vendor Market Share
- 6.2 Company Profiles
 - 6.2.1 RTX Corporation
 - 6.2.2 THALES
 - 6.2.3 Elbit Systems Ltd.
 - 6.2.4 3M
 - 6.2.5 BAE Systems plc
 - 6.2.6 Honeywell International Inc.
 - 6.2.7 L3Harris Technologies Inc.
 - 6.2.8 DuPont De Nemours Inc.
 - 6.2.9 Safariland LLC
 - 6.2.10 Ballistic Armor Co.
 - 6.2.11 ArmorSource LLC
 - 6.2.12 MKU Limited

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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