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# CBRN Defense Market Research Report- Global Forecast to 2030

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## Description:

## CBRN Defense Market Overview

**CBRN Defense Market Was Valued at USD 17,504.6 Million In 2021 And Is Expected To Grow With A CAGR Rate Of 5.72 % 2021-2030**

Chemical, biological, radiological, and nuclear (CBRN) security, is used to protect and prevent measures that can overcome security-related situations. CBRN security is the fast-growing market. The major challenge for this market is the protection of civilian lives and maintenance of economic stability. The multiple uses of CBRN agents today life is the major reason for the demand of CBRN protection, detection and decontamination.

Chemical, biological, radiological and nuclear defence (CBRN defence or CBRNE defence) are protective measures taken in situations in which chemical, biological, radiological or nuclear warfare (including terrorism) hazards may be present. CBRN defence consists of CBRN passive protection, contamination avoidance, and weapons of mass destruction mitigation.

A CBRN incident differs from a hazardous material incident in both scope (i.e., CBRN can be a mass casualty situation) and intent. CBRN incidents are responded to under the assumption that they are intentional and malicious; evidence preservation and perpetrator apprehension are of greater concern than with HAZMAT incidents.

This study on the global CBRN Defense market provides detailed information on industry trends, market dynamics, market size, competitive landscape, and growth opportunities. This research report categorizes the global CBRN Defense markets system, aircraft type, and region/country.

Based on system, the CBRN Defense market has been divided into Chemical, Biological, Radiological and Nuclear. Chemical segment dominated the market in 2021 and is estimated to remain the same during the review period, while Biological is expected to register the highest CAGR during the forecast period from 2022 to 2030.

### COVID-19 Analysis

The global economy took a big hit because of the emergence of COVID-19 worldwide in early 2020. Several nations across the globe were forced to impose lockdowns to fight the rapidly rising number of COVID-19 infections. The lockdown meant shutting down businesses and bringing most of the economic activities to a halt. As a result, most of the economies across the world were pushed into a recession, causing the economy to shrink and growth to decline significantly. Amidst COVID-19 disruptions, millions of people across the world were fired, causing a sudden increase in unemployment worldwide. The pandemic also affected the manufacturing sector as the manufacturing output went down in several countries because of a decline in demand, both external and domestic. In terms of economic growth, the developed nations were affected relatively worse as compared to developing nations.

However, the global economy is likely to grow in 2021 due to the rapid vaccine rollout in some of the large economies, a rise in international trade, consumer behaviour normalizing, and monetary and fiscal stimuli to some extent. As per the World Bank, there will be a 4.0% increase in global GDP in 2021. Moreover, every region is subjected to considerable growth upgrades; the Middle East & North Africa to increase by 2.1%, Europe & Central Asia by 3.6%, South Asia will grow by 7.2% in 2021 and 4.2% in 2022, Latin America increase by 4.6%, and East Asia & the Pacific region is expected to grow by 7.4%. Thus, the global economy is likely to recover, and the market is going to reach pre-pandemic levels in a couple of years.

### Market Dynamics

The growth of the global CBRN defense market is expected to be driven by key factors such as the growing CBRN threat from state & non-state actors. However, the market saturation in developed countries is expected to restrict the CBRN Defense Market growth in the global market. On the other hand, the increasing implementation of CBRN safety measures poses lucrative opportunities for the global CBRN defense market

### Drivers

- **Rising Number of Cockpit Upgrades to The Existing Military Aircraft Fleet**

Over the past decade, the threat environment in CBRN defense has rapidly evolved. Although the occurrence of CBRN events has been rare in these past years, they have had a far-reaching impact. Having the potential to bring about fatalities on a large scale, CBRN materials and agents may weaken or destabilize governments across the world, foster terrorism, and create scenarios that fuel violence & escalate conflicts. CBRN weapons may overwhelm the response capabilities of countries, particularly in the case of those that lack preparedness and technologies &

capabilities to deal with any such threats. State actors, including the Syrian regime, were also involved in CBRN agents-based attacks and threats, such as chemical attacks in Syria in 2017.

Over the recent past, some of the non-state actors have shown intent to employ these weapons but are limited by their capabilities. However, several government bodies have been trying to implement obstacles that prevent non-state actors from acquiring and weaponizing the CBRN agents and reduce the CBRN threat to a certain extent.

In order to tackle the growing CBRN threat, nations are working towards bolstering their capabilities and developing technologies on a priority basis. Thus, the growing CBRN threat from state & non-state actors is likely to propel the growth of the global CBRN defense market.

## **Opportunity**

### **• Increasing Military Spending**

Over the last decade, the world has witnessed robust growth in capital expenditure from the governments of various countries to bolster their military strength. Despite the COVID-19 pandemic shock to the global GDP growth, the defense budgets and revenues are likely to remain stable during the forecast period. Most of this can be attributed to the rising geopolitical tensions & conflicts, which make the military programs critical to the national defense. According to Stockholm International Peace Research Institute (SIPRI), the global military expenditure increased to USD 1,981 billion in 2020, an increment of 2.6% from 2019.

The military expenditure of the US alone accounted for USD 778 billion in 2020, marking a rise of 4.4% compared to 2019 and a dominant share of 39.27% in the global military spending in 2020. Heavy investment in R&D and increased expenditure on long-term projects, including modernization of the US nuclear arsenal, procurement of large-scale arms, and expenditure on defense programs for tackling new emerging threats, including CBRN defense programs. In 2020, with an estimated military expenditure of USD 252 billion, China was the second-largest military spender. Despite the pandemic shock to the global GDP growth, most countries increased their military spending in 2020. Amidst the rising geopolitical tensions and conflicts, rising civil unrest, and increasing riots, the major economies are expected to continue increasing their military spending, thereby offering lucrative opportunities for the players in the global CBRN defense market during the forecast period.

## **Market Segmentation**

The CBRN Defense Market has been segmented based on type, system, application, function, and region.

Based on Type, the global CBRN Defense market has been segmented into Chemical, Biological, Radiological and Nuclear.

By System, the CBRN Defense market has been segmented into Protective Wearable Systems, Respiratory Systems, Detection and Monitoring Systems, Decontamination Systems, Simulators, Information Management Software and Colpro System.

Based on Application, the global CBRN Defense market has been segmented into Military and Civil Law Enforcement.

By Function, the CBRN Defense market has been segmented into Protection, Detection, Decontamination and Simulation & Training.

## **Regional Analysis**

Globally, the CBRN Defense market has been categorized into five different regions—North America, Europe, Asia-Pacific, Middle East & Africa, and Latin America. North America accounted for the largest market share, with a market value of USD 5,003.4 Million in 2021; it is expected to register a CAGR of 5.07% during the forecast period. Europe was the second-largest market in 2021, valued at USD 4,270.5 Million; it is projected to register CAGR of 5.63%.

North America dominates the CBRN Defense market. It is expected to continue dominating the market in the coming years. Much of this anticipated demand for CBRN defenses can be ascribed to the increasing adoption of CBRN defense systems and growing recruitment of military personnel for training in counter-CBRN or CBRN defense operations. With rapid advancements in biological and chemical science & technology, the region continues to face increasing CBRN threats against its military forces and common population. The European CBRN Defense market is steadily rising, the growing CBRN threat and increased demand for CBRN defense systems to tackle the ever-increasing CBRN threat. The Asia-Pacific CBRN Defense market, based on country, has been segmented into China, Japan, India, South Korea, and the rest of Asia-Pacific.

## **Asia-Pacific Region to Bolster the CBRN Defense Market**

The Asia-Pacific region is expected to grow significantly during the forecast period. The factors primarily responsible for the growth of the CBRN defense market in the region are increasing CBRN threat from terrorist groups and non-state actors, a rise in civil unrest, and increasing riots across the region. Additionally, easy access to CBRN materials & agents amplifies the CBRN threat, which, in turn, boosts the market growth for CBRN defense systems. The factors primarily responsible for the growth of the CBRN defense market in the region are increasing CBRN threat from terrorist groups and non-state actors, a rise in civil unrest, and increasing riots across the region. Additionally, easy access to CBRN materials & agents amplifies the CBRN threat, which, in turn, boosts the market growth for CBRN defense systems.

## **Competitive Landscape**

The global market for CBRN Defense has witnessed significant growth over the forecast period due to high competition, frequent changes in government policies, and rising investments in R&D projects are key factors that impact market growth. There are several domestic, regional, and global players operating in the CBRN Defense market who continuously strive to gain a significant share of the overall market. During the study, MRFR has analyzed some of the major players in the global CBRN Defense market who have contributed to the market growth. These include MSA Safety, Inc., Smiths Group Plc, Teledyne FLIR LLC, Chemring Group Plc, Leidos, Inc., Avon Protection, Blücher GmbH, Argon Electronics (UK) Ltd., Seyntex, Saab AB, FLIR Systems, Inc.

During the study, MRFR has analyzed some of the major players in the global CBRN Defense market who have contributed to the global market growth.

## **Key Players**

- FLIR Systems, Inc
- Smiths Group PLC
- MSA Safety, Inc.
- Chemring Group PLC
- Leidos Inc.

## Recent Developments

- In March 2021, Avon Protection launched its portable CBRN protection device, CH15, an ultra-thin escape device that offers 15 minutes of protection against vision, respiratory, and facial protection from CBRN coercions.
- In July 2022, Argon Electronics (UK) Ltd. announced that its Radiation Field Training Simulator (RaFTS) would be featured in the INMM & ESARDA virtual joint annual meeting that will be conducted in Vienna, Austria, between 23rd August and 1st September 2021.
- In June 2021 Teledyne FLIR won an R&D contract worth USD 19 million for Joint Force CBRN Modernization.

## Report Overview

This study estimates revenue growth at global, regional, and country levels and offers an overview of the latest developments in each of the sub-sectors from 2018 to 2030. For this analysis, MRFR segmented the global Construction Software Market report based on system, aircraft type, and region.

## By Type

- Chemical
- Biological
- Radiological
- Nuclear

## By System

- Protective Wearable Systems
- Respiratory Systems
- Detection and Monitoring Systems
- Decontamination Systems
- Simulators
- Information Management Software
- Colpro System

## By Application

- Military
- Civil Law Enforcement

## By Function

- Protection
- Detection
- Decontamination
- Simulation & Training

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