

Report Information

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Counter IED Market Research Report – Global Forecast to 2030

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Description:

Global Counter IED Market Overview

Counter IED Market Size was valued at USD 1.5 billion in 2022. The counter IED market industry is projected to grow from USD 1.53 Billion in 2023 to USD 1.79 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 2.63% during the forecast period (2023 - 2030). Increased terrorist activity around the world, as well as better electronic explosive detecting devices, location-tracking jammers, and improvised explosive device (NIED) neutralization equipment, have a further impact are the key market drivers enhancing the market growth.

Counter IED Market Overview

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

Counter IED Market Trends

- **Innovations in IED Detection and Technological Advances Probable to Accelerate Market Growth**

The Counter IED market CAGR is being propelled by primarily focusing on three factors—detection, protection, and neutralization—the defense sector continues to diminish various IED dangers. The development of military vehicles has advanced considerably due to the pressing necessity to confront the looming IED danger. Because of the harsh terrain and ambiguity, customized infantry fighting vehicles (IFVs) and armored personnel carriers (APCs) rapidly supplanted conventional defense vehicles (APCs). Players in the counter-IED market are constantly focusing on innovation and deploying efficient counter-IED measures and solutions as a result of the evolving nature of the IEDs used by terrorist organizations.

Furthermore, the demand for counter-IED solutions has been steadily increasing as a result of an increase in IED threat events around the world, particularly in conflict zones like Iraq, Afghanistan, and other regions of the Middle East. Furthermore, in order to reduce losses, the defence industry across the globe is devoting more resources to identifying the various IED threats.

For instance, between 2018 and 2019, China's military spending increased by more than USD 8 billion. The predicted value in 2019 was higher than USD 260 billion. It is anticipated that by the end of 2030, China's growing emphasis on becoming a prominent commerce hub will also help the APAC market flourish. Driving the counter IED market's revenue in the process.

Counter IED Market Segment Insights

Counter IED End-Users Insights

The counter IED market segmentation, based on end-users includes homeland and security military. Due to increasing military spending and the urgent need to combat cross-border terrorism, the security military sector continues to be the main demand driver for C-IEDs. Over the next five years, it is projected that the market for C-IEDs in homeland security would expand more rapidly thanks to increased funding from governments of numerous nations, particularly China.

Counter IED Capability Insights

The counter IED market data is divided into two capabilities countermeasure and detection. In 2022, the detection category held the largest share in the market. The detection system is further subdivided into above-surface detection, underground mine and IED detection, stand-off IED detector, and remote IED detection equipment. Similarly, the countermeasure system is divided into jammers and neutralizers. Detection is expected to remain the dominating capability type in the market over the forecast period. It is the primary revenue generator for the market, with devices like as metal detectors, x-ray scanners, robotic systems, and counter-UAS. With jammers gaining market traction, countermeasures are likely to be the fastest-growing capability class.

Figure1 Counter IED Market, by Capability, 2022 & 2030 (USD billion)

Counter IED Market, by Capability, 2022 & 2030

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

Counter IED Deployment Insights

The counter IED market segmentation, based on deployment, includes airborne, vehicle-mounted, handheld, ship-mounted and others. Vehicle-mounted C-IEDs are further classified as armored vehicles, unmanned ground vehicles,

and others. Similarly, ship-mounted C-IEDs can be converted into naval and unmanned maritime vehicles, and airborne C-IEDs can be converted into aircraft, aerostats, and unmanned aerial vehicles. The vehicle-mounted sector is predicted to maintain its unrivaled lead until 2030. C-IEDs mounted on vehicles can be employed for detection, destruction, and/or jamming. They may have various subsystems, allowing a single vehicle to perform multiple functions (detection and countermeasure). All of the major players are capable of providing vehicle-mounted C-IEDs.

Counter IED Regional Insights

By region, the study provides the market insights into North America, Europe, Asia-Pacific and Rest of the World. Over the course of the projection period, North America is anticipated to be the largest market for C-IEDs. The United States is the market's growth engine thanks to large military spending and a greater emphasis on the deployment of emerging C-IED technology. The US Army, Navy, and Marine Corps, who have numerous long-term contracts with significant industry partners in place, are the main consumers of C-IED equipment.

Further, the major countries studied in the market report are The U.S., Canada, German, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure2 COUNTER IED MARKET SHARE BY REGION 2022 (%)

COUNTER IED MARKET SHARE BY REGION 2022

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

Europe's counter IED market accounts for the second-largest market share due to making significant investments in the creation and acquisition of cutting-edge military hardware. Further, the German counter IED market held the largest market share, and the UK counter IED market was the fastest-growing market in the European region.

The Asia-Pacific Counter IED Market is expected to grow at the fastest CAGR from 2023 to 2030. This is due to increasing improvised explosive device use in terrorist incidents and rising regional defense spending. Moreover, China's counter IED market held the largest market share, and the Indian counter IED market was the fastest-growing market in the Asia-Pacific region.

Counter IED Key Market Players & Competitive Insights

Leading market players are spending a lot of money on R&D to diversify their product offerings, which will spur further growth in the counter IED market. Important market developments include new product releases, contractual agreements, mergers and acquisitions, greater investments, and collaboration with other organizations. Market participants are also engaging in a number of strategic actions to increase their footprint. The counter IED industry needs to provide affordable products if it wants to grow and thrive in a more competitive and challenging market environment.

One of the primary business strategies employed by manufacturers in the worldwide counter IED industry to assist customers and expand the market sector is local manufacturing to reduce operational costs. The counter IED industry has recently given medicine some of its most important benefits. Elbit Systems Ltd. (Israel), Northrop Grumman Corporation (US), L3 Technologies (US), Thales Group (France), Harris Corporation (US), Lockheed Martin Corporation (US), and other major players in the counter IED market are investing in research to improve their competitiveness.

The Sierra Nevada, which translates to "mountain range covered in snow," is a group of mountains in Spain's Andalusian province of Granada. It contains Mulhacén, which rises 3,479 meters (11,414 feet) above sea level and is the highest peak in mainland Spain. In a region along the Mediterranean Sea that is mostly recognized for its mild temperatures and ample sunshine, it is a well-liked tourist attraction because of its high peaks, which make skiing possible in one of Europe's most southern ski resorts. The city of Granada, as well as Almera and Málaga, are located at its slopes. In June 2020, The Degraded Visual Environment Pilotage System (DVEPS) for the U.S. Special Operations Command OCOM and particular U.S. Army aircraft was procured, delivered, and supported by Sierra Nevada Corporation (SNC) under a production contract with multiple delivery orders.

L3Harris Technologies, Inc. is an American technology firm that also serves as a defense contractor and a provider of information technology services. It makes C6ISR systems and products as well as wireless gear, tactical radios, avionics and electronic systems, night vision gear, and both terrestrial and spaceborne antennas for use in the public, private, and commercial sectors.

They are experts in electronic warfare, microwave weapons, and surveillance solutions. On June 29, 2019, it was created by the union of Harris Corporation and L3 Technologies (formerly L-3 Communications), and it was projected to become the sixth-largest defense contractor in the United States. In August 2019, To supply electronic warfare (EW) systems for the international F-16, L3 Harris Technologies, Inc. was awarded a US\$ 400 Mn increase to the single-award IDIQ contract. These strategic developments will probably aid the company in increasing sales.

Key Companies in the counter IED market include

- Chemring Group PLC (UK)
- BAE Systems (UK)
- Raytheon Company (US)
- General Dynamics Corporation (US)
- Elbit Systems Ltd (Israel)
- Northrop Grumman Corporation (US)
- L3 Technologies (US)
- Thales Group (France)
- Harris Corporation (US)
- Lockheed Martin Corporation (US).

Counter IED Market Segmentation

Counter IED End-Users Outlook

- Homeland
- Security military

Counter IED Capability Outlook

- Countermeasure
- Detection

Counter IED Market Deployment Outlook

- Airborne
- Vehicle-Mounted
- Handheld
- Ship-Mounted
- Others

Counter IED Regional Outlook

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia
 - Rest of Asia-Pacific
- Rest of the World
 - Middle East
 - Africa
 - Latin America

Counter IED Industry Developments

For instance, In December 2020, Netlink Communications Technologies, a privately held corporation, delivered on its promise to the Spanish Ministry of Defense (MoD). This promise resulted in the delivery of 51 C-Guard RJ Vehicle Counter-IED Systems to the MoD.

For instance, In February 2022,The Japanese government announced JPY 2 billion (about USD 17 million) in funding for Phase 2 of Integrated Mine Clearing and Landmine Victim Support. The program's goal is to assist the Cambodian Mine Action Centre (CMAC) with demining and victim aid. Previously, the Japanese government invested JPY 1 billion (9 billion) for Phase-1, which lasted two years and was finished in June 2022.

For instance, In February 2022,The US State Department has cleared a potential USD 6 billion foreign military sale (FMS) to Poland. The Polish government had previously requested 250 M1A2SEPV3 Abrams main battle tanks and 250 AN/VLQ-12 CREW Duke counter-IED systems, as well as authorisation for the sale of M88A2 HERCULES combat recovery vehicles, M1110 joint assault bridges, and infantry weaponry.

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