

Report Information

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Ballistic Protection Market Research Report— Global Forecast till 2030

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Description:

Market Scenario

Global Ballistic Protection Market is projected to reach USD 19.560 Billion by 2030 and register a CAGR of 6.31%. Ballistic protection products serve the purpose of protecting homeland security & law enforcement forces, army vehicles, and soldiers from bullets, explosive materials, mortar, mines, electrical shocks, heat, chemicals, and biohazards.

Market Synopsis

Global Ballistic Protection Market is expected to register significant growth during the forecast period owing to factors such as rising political unrest and instability as well as increasing incidences of terrorism. Furthermore, growing domestic conflict is also expected to drive the growth of the market. Additionally, the increasing adoption of ballistic protection equipment by the armed forces of developed countries such as the UK to offer enhanced security to military personnel is also expected to drive the growth of the market. For example, in December 2019, Leonardo SpA signed a contract with Permali to acquire ballistic protection systems for the UK Royal Navy's new Commando Merlin Mk4 helicopters.

However, issues related to heavy equipment weight affecting the mobility of security forces and high development costs might hinder the market growth.

Market USP

Advancements in technology and the growing use of advanced materials for manufacturing ballistic protection equipment is expected to drive the growth of the segment.

Market Drivers

- **Changing Nature of Warfare**
- **Need for Comfortable, Lightweight, and High-Strength Materials**
- **Growing Domestic Conflicts:** Increasing geopolitical tension and rising terrorism are expected to drive the growth of the ballistic protection market.

Market Restraints

- **Issues Related to Heavy Equipment Weight**
- **High Cost of Development**
- **Stringent Government Regulations**

Segmentation

By Platform

- **Land:** The segment dominated the market in 2019 owing to growing territorial conflicts and increasing military modernization programs.
- **Airborne:** The segment is expected to grow at the highest CAGR during the forecast period from 2020 to 2026. The changes in the dynamics of war and the introduction of UAVs on the battlefield have resulted in the growth of this segment.

- **Marine:** The increasing development of connected and autonomous ships that support advanced security systems is expected to drive the growth of the segment. Furthermore, the growing need to offer enhanced safety to navy personnel is also expected to drive the growth of the segment.

By Technology

- **Soft Armor:** The segment dominated the global market in 2019 as soft armor offers benefits such as high shear strength, light weight, and high flexibility, which are expected to boost the growth of this segment.
- **Hard Armor:** The segment is expected to record higher CAGR during the forecast period. Hard armor is comparatively thicker and more rigid than soft armor. Polymer composites reinforced with steel and ceramics are used to make hard armor.

By Application

- **Defense:** The segment dominated the market in 2019. The increasing adoption of ballistic protection by the US Air Force to offer enhanced safety to the military forces deployed in rough terrains is expected to drive the growth of the segment during the review period.
- **Homeland Security:** The segment is expected to grow at the higher CAGR during the forecast period, 2020 to 2028. The homeland security officers use combat systems, which are ballistic resistant due to being reinforced with ceramics and thermoplastics; thus, the demand from homeland security forces is expected to boost the growth of this segment.

By Material

- **Aramid:** Aramid fiber is extensively used in manufacturing safety equipment such as body armor, helmets, vehicle armor, and tactical vests.
- **Glass Fiber:** Increasing government regulations regarding passenger, crew, and officers' safety is expected to drive the growth of the segment. Increasing initiatives undertaken by government bodies to provide safe barriers such as bulletproof glass, vests, cars, buses to the soldiers and officers to avoid casualties are expected to drive the growth of the segment.
- **Composites:** Composites offer advantages such as corrosion resistance and excellent fatigue. Additionally, the growing use of composites for manufacturing aerospace components is also expected to drive the growth of this segment. Hence, the segment dominated the market in 2019 and is expected to grow at the highest CAGR from 2020 to 2026.
- **Ceramic:** The hard armor-type equipment is made from polymer composites reinforced ceramic.
- **Fabric:** The increasing adoption of fabric to manufacture lightweight ballistic clothing is expected to drive the growth of the segment.
- **Metals & Alloys:** Increasing military modernization programs are expected to drive the growth of the segment.

By Region

- **North America:** North America dominated the global ballistic protection market in 2019 due to the presence of prominent companies such as Honeywell International, Inc., and 3M.
- **Europe:** The increasing investments made by the governments of

countries such as the UK in procuring ballistic protection equipment for the armed forces are expected to drive the market growth in the region.

- **Asia-Pacific:** The market in this region is projected to register the highest CAGR during the forecast period. Increasing territorial conflicts in the region and rising defense expenditures of countries such as China and India are driving the market growth in Asia-Pacific.
- **Middle East:** Increasing terrorist activities in the region are driving the market growth in the Middle East.
- **Rest of the World:** Extreme warfare situations in countries such as Mexico and African countries are expected to fuel the demand for ballistic protection equipment in these regions.

Key Players

- BAE Systems (UK)
- 3M (US)
- Rheinmetall AG (Germany)
- Koninklijke Ten Cate bv (Netherlands)
- FMS Enterprises Migun LTD. (Israel)
- Point Blank Enterprises, Inc. (US)
- DuPont (US)
- ADA (Australia)
- Survitec Group Limited (UK)
- ArmorWorks (US)

Other Prominent Players

- Revision Military (US)
- ArmorSource, LLC (US)
- Southern States, LLC (US)
- Craig International Ballistics Pty Ltd. (Australia)
- Teijin Limited (Japan)
- Saab AB (Sweden)
- MKU Limited (India)
- Morgan Advanced Materials plc (UK)
- ELMON (Greece)
- Honeywell International, Inc. (US)
- Permalı (UK)

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