

# Global Non-Lethal Chemical Warfare Agents Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Non-Lethal Chemical Warfare Agents market size is expected to reach \$ 2130 million by 2032, rising at a market growth of 7.1% CAGR during the forecast period (2026-2032).

Non-lethal chemical warfare agents refer to chemical substances used in military or law enforcement operations to temporarily incapacitate, disperse, or control crowds, but not intended to cause permanent harm or death. These mainly include irritant agents (such as CS, CN, and OC capsaicin) and incapacitating agents (such as BZ-type compounds). Their mechanism of action involves causing eye irritation, respiratory discomfort, and temporary mental or physical dysfunction. The upstream of the industry chain includes suppliers of fine chemical raw materials (such as o-chlorobenzaldehyde, cyclohexanone, and capsaicin oleoresin), solvents, propellants, and aerosol canisters. The midstream consists of suppliers with military qualifications or special... Chemical production licensed formulation companies are responsible for synthesis, formulation, filling, and stability testing. Their downstream customers are mainly national law enforcement agencies, riot police, the military, and authorized security units. They sell through government bidding, defense procurement, or licensed export channels. Due to strict regulations, safety certifications, and small-batch customized production, the average unit price of these products is relatively high (a single tear gas canister or spray device can cost tens to hundreds of US dollars). The industry has high barriers to entry, and companies with compliance qualifications and large-scale production capabilities generally maintain a gross profit margin of 50%?70%, which is significantly higher than that of ordinary chemical products. In 2025, the global production of non-lethal chemical warfare agents was approximately 13.474 million units, with an average global market price of approximately US\$95 per unit. The global production capacity of non-lethal chemical warfare agents was approximately 17.965 million units in 2025.

Currently, the non-lethal chemical warfare agent industry is developing steadily, driven

by the needs of counter-terrorism and stability maintenance, public safety, and low-intensity conflicts. Law enforcement and security forces in many countries around the world are accelerating the deployment of irritants (such as CS and OC) and new incapacitating agents, pushing products towards greater controllability, reversibility, and environmental friendliness. Strictly constrained by the Chemical Weapons Convention, the industry is highly concentrated in a few companies with national authorization and military qualifications, with research and development focusing on precise dosage control, rapid metabolism, low residue, and improved safety for sensitive populations. Simultaneously, with the advancement of information-based warfare and the systematization of non-lethal capabilities, chemical warfare agents are deeply integrated with delivery platforms (such as drones and smart launchers) and expanding into new scenarios such as border control, prison management, and maritime law enforcement. In the future, the industry will continue to strengthen the trends of 'humanization, intelligence, and modularization' within a compliant framework, but geopolitical risks and ethical controversies will remain significant constraints.

This report studies the global Non-Lethal Chemical Warfare Agents demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Non-Lethal Chemical Warfare Agents, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Non-Lethal Chemical Warfare Agents that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Non-Lethal Chemical Warfare Agents total market, 2021-2032, (USD Million)

Global Non-Lethal Chemical Warfare Agents total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Non-Lethal Chemical Warfare Agents total market, key domestic companies, and share, (USD Million)

Global Non-Lethal Chemical Warfare Agents revenue by player, revenue and market share 2021-2026, (USD Million)

Global Non-Lethal Chemical Warfare Agents total market by Type, CAGR, 2021-2032, (USD Million)

Global Non-Lethal Chemical Warfare Agents total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Non-Lethal Chemical Warfare Agents market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Lamperd Less Lethal, Axon Enterprise, Inc, EDGE Group, DaeKwang Chemical Corporation, Combined Systems Inc, SABRE,

UDAP Industries, Inc., Chemring Group, POM Industries, LRAD Corporation, etc. This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Non-Lethal Chemical Warfare Agents market

**Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Non-Lethal Chemical Warfare Agents Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-Lethal Chemical Warfare Agents Market, Segmentation by Type:

Lachrymatory Agents

Respiratory Irritants

Skin Irritant Agents

Central Nervous System Affecting Agents

## Global Non-Lethal Chemical Warfare Agents Market, Segmentation by Delivery Form:

Aerosol Chemical Agents

Grenade-based Chemical Agents

Liquid Spray Agents

## Global Non-Lethal Chemical Warfare Agents Market, Segmentation by Operational Environment:

Law Enforcement Chemical Agents

Military Non-Lethal Chemical Agents

Correctional Facility Control Agents

## Global Non-Lethal Chemical Warfare Agents Market, Segmentation by Application:

Military Peacekeeping Missions

Urban Security Operations

Anti-terrorism Non-lethal Measures

Critical Infrastructure Protection

Special Police Tactical Support

## **Companies Profiled:**

Lamperd Less Lethal

Axon Enterprise, Inc

EDGE Group

DaeKwang Chemical Corporation

Combined Systems Inc

SABRE

UDAP Industries, Inc.

Chemring Group

POM Industries

LRAD Corporation

Zarc International, Inc.

Amtec Less Lethal Systems Inc

Guardian Protective Devices

Taser International Manufacturing Company

#### Key Questions Answered

1. How big is the global Non-Lethal Chemical Warfare Agents market?
2. What is the demand of the global Non-Lethal Chemical Warfare Agents market?
3. What is the year over year growth of the global Non-Lethal Chemical Warfare Agents market?
4. What is the total value of the global Non-Lethal Chemical Warfare Agents market?
5. Who are the Major Players in the global Non-Lethal Chemical Warfare Agents market?
6. What are the growth factors driving the market demand?

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