

# **Non-lethal Weapons Market Size, Share & Trends Analysis Report By Product (Conducted Energy Devices, Directed Energy Systems), By End Use (Civil & Defense, Defense), By Region(North America, Europe, Asia Pacific, Central & South America, Middle East & Africa), And Segment Forecasts, 2026 - 2033**

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## **Abstracts**

The global non-lethal weapons market size was estimated at USD 9.53 billion in 2025 and is projected to reach USD 15.81 billion by 2033, growing at a CAGR of 6.5% from 2026 to 2033. The demand for non-lethal weapons is increasing due to rising instances of civil unrest, protests, and demonstrations globally.

Law enforcement agencies are under growing pressure to use alternatives to lethal force in order to minimize casualties and ensure public safety. Military operations in peacekeeping missions also rely on these weapons to control hostile crowds without escalating conflicts. Increasing urbanization has led to denser populations, necessitating safer crowd-control measures. Public scrutiny on police brutality and accountability is compelling governments to adopt less-lethal solutions. Security at large gatherings such as sporting events, political rallies, and concerts further drives adoption.

Key demand drivers include modernization initiatives in law enforcement and military organizations aimed at adopting less harmful defense mechanisms. Technological advancements such as directed energy weapons, acoustic devices, and improved chemical irritants enhance operational efficiency. Rising threats of terrorism, border conflicts, and insurgencies also accelerate the procurement of non-lethal systems. Growth in private security and protection of critical infrastructure supports steady

adoption. Pressure from international human rights organizations prompts governments to adopt non-lethal crowd management solutions.

Governments worldwide are actively promoting the adoption of non-lethal weapons through defense modernization programs and law enforcement upgrades. Initiatives such as funding for riot control, border security, and peacekeeping have included provisions for these systems. International cooperation programs often supply less-lethal technologies to developing nations as part of security assistance. Export regulations on lethal-force equipment have further driven the adoption of alternatives. Countries such as the U.S., UK, India, and China have integrated non-lethal systems into standard policing kits.

### Global Non-lethal Weapons Market Report Segmentation

This report forecasts revenue growth at the regional & country levels and provides an analysis of industry trends in each subsegment from 2021 to 2033. For this study, Grand View Research has segmented the global non-lethal weapons market based on product, end use, and region:

Product Outlook (Revenue, USD Million, 2021 - 2033)

Gases & Sprays

Conducted Energy Devices

Grenades & Flashbangs

Directed Energy Systems

Others

End Use Outlook (Revenue, USD Million, 2021 - 2033)

Civil & Defense

Defense

Regional Outlook (Revenue, USD Million, 2021 - 2033)

## North America

U.S.

Canada

Mexico

## Europe

UK

Germany

France

Spain

## Asia Pacific

China

Japan

India

South Korea

## Central & South America

## Middle East & Africa

Saudi Arabia

UAE

Egypt

Qatar

## Kuwait

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