

# **CBRN Defense Market by Type, End Use, Equipment (Protective Wearables, Respiratory Systems, Detection & Monitoring Systems, Decontamination Systems, Simulators, Information Management Software) & Region – Global Forecast to 2028**

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## **Abstracts**

CBRN Defense market is projected to grow from USD 16.1 billion in 2023 to USD 21.4 billion by 2028, at a CAGR of 5.8% during the forecast period. Governments, armed forces, and first responders employ defense strategies against CBRN threats, encompassing Chemical, Biological, Radiological, Nuclear, and high-yield explosives. These strategies involve the use of detection, identification, and prevention techniques. The CBRN defense market has undergone significant transformation in response to heightened geopolitical tensions. Notably, the supply side of the market has experienced the integration of modern technologies such as virtual reality, augmented reality, and the Internet of Things (IoT). Anticipated is exponential growth in this market, attributed to a substantial surge in demand for CBRN defense equipment across diverse industries. A major driving force behind this growth is the increased global military spending.

CBRN Defense market is dominated by a few globally established players such as Thales Group (France), Rheinmetall Defence (Germany), Smiths Group PLC (UK), Teledyne FLIR LLC (US), and Bruker Corporation (US), among others, are the key manufacturers that secured CBRN Defense contracts in the last few years. Significant attention has been directed toward contracts and the development of new products, driven by the rising demand for CBRN defense equipment. The growth of emerging markets has incentivized companies to embrace this strategy as a means of entering new markets.

Based on Type, chemical segment is estimated to witness the largest share of the CBRN Defense market in 2023.

Based on type, chemical segment of the CBRN Defense market is estimated to hold the dominant market share in 2023. The adoption of advanced chemical detection systems, such as Smiths Detection's Next Generation AVCAD, by the US Department of Defense in September 2023, highlights the driving factor of enhancing chemical CBRN defense capabilities, especially in military applications.

Based on Equipment, protective wearables segment of the CBRN Defense market is projected to witness the largest share in 2023.

Based on equipment, protective wearables segment is projected to lead the CBRN Defense market during the forecast period. The driving factor for this segment lies in the necessity to safeguard against CBRN threats, with protective wearables, including clothing, gas masks, escape devices, shoes, and gloves, being crucial for first responders, hazmat safety officers, and military CBRN response teams, with the determination of the appropriate protective wearable guided by factors like contamination levels and military-specific Mission-Oriented Protective Posture (MOPP) guidelines.

Based on end use, defense segment is estimated to account for the largest share of the CBRN Defense market from 2023 to 2028.

Based on end use, defense segment is estimated to account for the largest share of the CBRN Defense during the forecast period. The defense segment includes military and homeland security. The driving factor for this segment is the comprehensive need for CBRN defense capabilities within the defense and government segment, encompassing the military (army, navy, and air force) and homeland security, where essential equipment such as protective wearables, detection tools, and decontamination systems are vital for military users and homeland security personnel, including first responders, police, fire safety departments, and hazmat safety officers.

The Asia Pacific market is projected to contribute the largest share from 2023 to 2028 in the CBRN Defense market

Based on region, Asia Pacific is expected to lead the CBRN Defense market from 2023 to 2028 in terms of market share. The rise in occurrences of terror attacks in the Asia Pacific region has prompted countries in the area to strengthen their CBRN defense

capabilities. Furthermore, increased defense expenditures in nations such as India and China, coupled with the expansion of military commands in emerging economies, have spurred a heightened demand for CBRN Defense in the Asia Pacific region. The escalating need for CBRN defense solutions can be traced to countries' growing investments in the development and procurement of advanced CBRN defense measures, particularly for their armed forces, border protection, and biowarfare programs.

The break-up of the profile of primary participants in the CBRN Defense market:

By Company Type: Tier 1 – 45%, Tier 2 – 35%, and Tier 3 – 20%

By Designation: C Level – 35%, Director Level – 25%, and Others – 40%

By Region: North America – 30%, Europe – 20%, Asia Pacific – 45%, Middle East – 5%

Major companies profiled in the report include Thales Group (France), Rheinmetall Defence (Germany), Smiths Group PLC (UK), Teledyne FLIR LLC (US), and Bruker Corporation (US), among others.

Research Coverage:

This market study covers the CBRN Defense market across various segments and subsegments. It aims at estimating the size and growth potential of this market across different segments based on type, equipment, end use, and region. This study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their product and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

Key benefits of buying this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall CBRN Defense market. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and

opportunities.

The report provides insights on the following pointers:

**Market Penetration:** Comprehensive information on CBRN Defense offered by the top players in the market

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product launches in the CBRN Defense market

**Market Development:** Comprehensive information about lucrative markets – the report analyses the CBRN Defense market across varied regions

**Market Diversification:** Exhaustive information about new products, untapped geographies, recent developments, and investments in the CBRN Defense market

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the CBRN Defense market

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