

Advanced Combat Helmet Market Forecasts to 2032 - Global Analysis By Type (High-Cut Helmets and Low-Cut Helmets), Material Type (Aramid, Ultra-High-Molecular-Weight Polyethylene (UHMWPE), Thermoplastics, Hybrid Composites, and Other Material Types), Application, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Advanced Combat Helmet Market is accounted for \$3.11 billion in 2025 and is expected to reach \$5.09 billion by 2032 growing at a CAGR of 7.3% during the forecast period. An Advanced Combat Helmet (ACH) is a protective headgear designed for military personnel, offering enhanced ballistic protection, impact resistance, and comfort. Constructed from cutting-edge materials like Kevlar or ultra-high molecular weight polyethylene, it lessens head injuries from blunt impacts, bullets, and shrapnel. The advanced combat helmet is an essential part of contemporary battlefield gear for soldiers' safety and operational effectiveness since it frequently incorporates mounting systems for night vision devices, communication equipment, and face shields.

According to SIPRI, global military expenditure reached around USD 2,443 billion in 2023, reflecting an increase of 6.8% from 2022.

Market Dynamics:

Driver:

Rising defense budgets and modernization programs

Governments worldwide are allocating increased funds to enhance the safety and operational effectiveness of their armed forces, spurred by escalating geopolitical tensions, terrorism, and cross-border conflicts. This surge in spending enables the procurement of next-generation helmets with improved ballistic protection, integrated communication systems, and lightweight materials. Furthermore, modernization initiatives ensure that military and law enforcement agencies continually upgrade their equipment, fostering sustained demand for advanced combat helmets.

Restraint:

High cost of advanced helmets

The high cost of advanced helmets serves as a significant restraint in the market, primarily due to the incorporation of sophisticated materials and integrated technologies such as communication systems and night vision compatibility. These features elevate manufacturing expenses, making the helmets considerably more expensive than traditional alternatives. Additionally, budget constraints in some countries and agencies can limit widespread adoption, especially among smaller defense forces or in regions with limited resources. Over time, advancements in manufacturing and economies of scale may help reduce costs, but the initial investment remains a barrier for many potential buyers.

Opportunity:

Integration of smart technologies

Incorporating features such as augmented reality displays, real-time communication modules, night vision, and sensor systems transforms helmets into multifunctional platforms, significantly enhancing situational awareness and operational efficiency for soldiers. Moreover, these advancements support mission adaptability and provide a tactical edge in complex environments. As defense agencies increasingly prioritize digital transformation and battlefield connectivity, the demand for smart, technologically advanced helmets is expected to accelerate, opening new avenues for market growth.

Threat:

Counterfeit products

The proliferation of low-quality, unverified helmets can result in inadequate protection for military and law enforcement personnel, potentially leading to severe injuries or fatalities. Additionally, the presence of counterfeit goods erodes trust in legitimate manufacturers and can damage the reputation of established brands. Regulatory bodies and defense agencies are intensifying efforts to combat counterfeiting through stringent procurement standards and authentication measures, but the risk remains a persistent challenge for the industry.

Covid-19 Impact:

The Covid-19 pandemic had a notable adverse impact on the advanced combat helmet market, primarily due to global lockdowns and disruptions in manufacturing and supply chains. Production delays and logistical challenges led to a temporary decline in helmet demand, especially during the initial phases of the pandemic. However, the need for advanced protective equipment persisted due to ongoing security threats, helping the market stabilize more quickly than other sectors. As restrictions eased and defense procurement resumed, the market began to recover, albeit with lingering supply chain vulnerabilities.

The high-cut helmets segment is expected to be the largest during the forecast period

The high-cut helmets segment is expected to account for the largest market share during the forecast period. This dominance is attributed to their widespread adoption by military and law enforcement agencies, driven by the need for enhanced situational awareness, compatibility with communication headsets, and improved comfort. High-cut helmets offer superior integration with advanced accessories such as night vision devices and communication systems, making them ideal for modern tactical operations. Furthermore, advancements in lightweight materials and ergonomic designs have made high-cut helmets the preferred choice for personnel requiring agility and extended wear in diverse operational environments.

The ultra-high-molecular-weight polyethylene (UHMWPE) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the ultra-high-molecular-weight polyethylene (UHMWPE) segment is predicted to witness the highest growth rate. UHMWPE is renowned for its exceptional strength-to-weight ratio, offering superior ballistic protection while remaining lightweight and comfortable for extended use. Its resistance to chemicals and extreme durability make it highly suitable for advanced combat helmets, supporting the trend

toward lighter, more protective headgear. Additionally, the increasing focus on soldier mobility and endurance is driving the adoption of UHMWPE, positioning it as the fastest-growing material segment in the market.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share. This leadership is driven by substantial defense budgets, continuous military modernization programs, and strong demand from both military and law enforcement agencies. The United States, in particular, invests heavily in advanced protective equipment, with significant procurement contracts and ongoing research and development initiatives. Moreover, the presence of major industry players and robust infrastructure for innovation further strengthens North America's dominance in the advanced combat helmet market.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. This rapid growth is fueled by increasing defense expenditures, ongoing modernization efforts, and heightened security concerns in countries such as China, India, and Japan. Additionally, regional conflicts and the need to equip expanding armed forces with state-of-the-art protective gear are driving demand. The focus on adopting advanced materials and integrating smart technologies into helmets is further accelerating market expansion in Asia Pacific.

Key players in the market

Some of the key players in Advanced Combat Helmet Market include ArmorSource LLC, Honeywell International Inc., Revision Military Inc., DuPont de Nemours Inc., 3M Company, BAE Systems plc, Morgan Advanced Materials plc, Ceradyne Inc., MKU Limited, Point Blank Enterprises Inc., Gentex Corporation, Eagle Industries, Survitec Group, Avon Protection plc, Ballistic Armor Co., Chase Tactical LLC, Safariland LLC and ArmorWorks Enterprises, LLC.

Key Developments:

In April 2025, following the successful delivery of 14,000 units of its next-generation CREW II Advanced Combat Vehicle Crewman (ACVC) helmet system, ArmorSource has been awarded a major follow-on contract by the U.S. Defense Logistics Agency

(DLA). Valued at \$18.6 million, the new order includes up to 30,000 additional ACVC helmets to be delivered over the next five years. The CREW II helmet is the only ultra-lightweight, Gen II ballistic ACVC helmet shell currently available worldwide.

In January 2025, DuPont partnered with Point Blank Enterprises to introduce body armor made with Kevlar® EXO™, a new aramid fiber technology offering improved performance and flexibility.

In September 2023, The UK Ministry of Defence (MOD) has awarded BAE Systems a contract to develop its Striker II Helmet Mounted Display (HMD) for the Royal Air Force (RAF) Typhoon fleet. Striker II will provide the RAF's Typhoon pilots with a crucial advantage – offering unrivalled situational awareness from the cockpit while helping to avoid sensory overload, which is vital in a high-tech and fast-paced environment. This contract will enable our electronics and combat air experts to work together to develop the helmet to further enhance the critical role Typhoon pilots play in round-the-clock defence and security of our nation.

Types Covered:

High-Cut Helmets

Low-Cut Helmets

Material Types Covered:

Aramid

Ultra-High-Molecular-Weight Polyethylene (UHMWPE)

Thermoplastics

Hybrid Composites

Other Material Types

Applications Covered:

Protection

Communication

Visual Assistance

End Users Covered:

Military & Defense

Law Enforcement Agencies

Homeland Security

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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