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Counter-Improvised Explosive Device (IED) Market Forecasts to 2034 – Global Analysis By Deployment (Vehicle Mounted, Airborne Mounted, Ship Mounted, Handheld and Other Deployments), Capability (Countermeasures, Neutralization, Detection, Jammers, Explosive Ordnance Disposal (EOD) and Neutralizing Improvised Explosive Devices (NIED)), End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Counter-Improvised Explosive Device (IED) Market is accounted for $10.4 billion in 2026 and is expected to reach $17.8 billion by 2034 growing at a CAGR of 7.0% during the forecast period. Counter-Improvised Explosive Device (IED) is created primarily for military and law enforcement. They are used for standoff detection of explosives and explosive precursor components and defeating the improvised explosive devices (IEDs) devices themselves as part of a broader counter-terrorism, counter-insurgency, or law enforcement effort.

According to a report by the United Nations, in the recent years more than 4300 improvised explosive devices events have resulted to an evaluated 65,400 casualties.

Market Dynamics:

Driver:

Enhanced focus on counter-IED developments

The escalating threat landscape, marked by increased instances of terrorism and asymmetric warfare, compels nations and security entities to prioritize advancements in detection, neutralization, and protection against improvised explosive devices. This heightened focus is spurred by the recognition that IEDs pose a persistent and adaptive threat. Furthermore, governments, defence contractors, and technology firms strategically invest in research and development, fostering innovation and the creation of cutting-edge technologies. As a result, an intensified commitment to counter-IED solutions reflects the dynamic nature of security challenges, driving market growth.

Restraint:

Lack of interoperability

The absence of standardised protocols and compatibility between different counter-IED systems hinders seamless coordination and information sharing. Inconsistent communication and integration can impede the effectiveness of counter-IED efforts, limiting the ability of various technologies to work cohesively in real-world scenarios. Thereby, it will hinder market growth.

Opportunity:

Homeland security investments

Governments' heightened commitment to securing national borders, critical infrastructure, and public spaces prompts increased funding for advanced counter-IED technologies. This significant investment creates a favourable environment for the development and deployment of innovative solutions, including detection, neutralisation, and preventive solutions to safeguard against evolving threats. Furthermore, as nations prioritise homeland security, the market gains opportunities to contribute to the development of resilient defence systems.

Threat:

Global economic uncertainty

Economic downturns and uncertainties can lead to reduced government spending on defence, impacting investments in research, development, and procurement of advanced counter-IED technologies. Shrinking budgets may constrain the market's growth, hindering the development of innovative solutions to address evolving threats.

The financial strain on defence budgets may impede the timely acquisition and deployment of counter-IED measures. As a result, it will hamper market expansion.

Covid-19 Impact

The COVID-19 pandemic is disrupting supply chains, delaying research and development projects, and affecting defence budgets. Lockdowns and restrictions slowed down manufacturing and procurement processes, leading to delays in the delivery of counter-IED technologies. However, the pandemic underscored the importance of resilient security infrastructure, prompting increased focus on technological innovations to address emerging threats. As global conditions stabilise, the market is expected to rebound, with renewed emphasis on countering evolving security challenges.

The vehicle-mounted segment is expected to be the largest during the forecast period

The vehicle-mounted segment is estimated to hold the largest share. It involves the deployment of specialized technologies on vehicles to detect and mitigate potential threats. Vehicle-mounted counter-IED solutions enhance mobility, allowing rapid response to dynamic threat scenarios. They play a crucial role in safeguarding military convoys, law enforcement patrols, and other mobile units against improvised explosive devices, mitigating risks in regions with security challenges. The segment underscores the importance of adaptable and mobile counter-IED capabilities for enhanced security measures.

The homeland security segment is expected to have the highest CAGR during the forecast period

The homeland security segment is anticipated to have lucrative growth during the forecast period. The purpose of homeland security is to protect critical infrastructure and civilian populations against improvised explosive devices. Moreover, these counter-IED solutions play a vital role in mitigating risks associated with terrorist activities and asymmetric threats, ensuring the protection of national borders, public spaces, and key facilities. The segment reflects a commitment to maintaining homeland security in the face of evolving security challenges.

Region with largest share:

Asia Pacific commanded the largest market share during the extrapolated period due to

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heightened security concerns, driving robust investments in advanced technologies. Countries like India, China, and others are actively modernising their defence capabilities, emphasising counter-IED solutions. Furthermore, governments across the region initiate comprehensive programmes, fostering collaborations with defence contractors and technology firms. The diverse geopolitical landscape contributes to varied approaches, making the Asia-Pacific region a dynamic hub for innovative counter-IED strategies, reflecting a commitment to regional security and stability.

Region with highest CAGR:

North America is expected to witness profitable growth over the projection period due to robust technological advancements and strategic initiatives to address evolving security challenges North American countries invest significantly in military and homeland security applications, driving the demand for cutting-edge counter-IED solutions to protect military personnel, law enforcement, and civilians. Moreover, the integration of robotics, artificial intelligence, and sensor systems exemplifies the region's commitment to comprehensive counter-IED strategies.

Key players in the market

Some of the key players in the Counter-Improvised Explosive Device (IED) Market include Lockheed Martin Corporation, Elbit Systems Ltd, L3Harris Technologies Inc., Northrop Grumman Corporation, Saab AB, Thales Group, Raytheon Technologies Corporation, Allen-Vanguard Corporation, Chemring Group PLC, QinetiQ Group PLC, Israel Aerospace Industries Ltd, Rheinmetall AG, BAE Systems, General Dynamics Corporation, Sierra Nevada Corporation, Parnisari Arms, Netline Communications Technologies, SRC and Cobham plc.

Key Developments:

In December 2022, L3Harris Technologies announced delivery of the first of more than 100 T7™ explosive ordnance disposal robots to the U.S. Air Force as part of a contract supporting the USAF’s global EOD mission.

In February 2022, Allen-Vanguard, a manufacturer of counter-improvised explosive devices (IED), and DroneShield Limited, a counter unmanned aerial systems (UAS) provider entered into a partnership to explore the development of new products and also market an integrated counter-UAS and counter-IED system to their customers.

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In February 2021, Northrop Grumman received a contract worth $329.9 million from the U.S. navy to provide electronic warfare technology to Australia to help mitigate the risk from materials that can be detonated by radio signals.

Deployments Covered:

- Vehicle Mounted
- Airborne Mounted
- Ship Mounted
- Handheld
- Other Deployments

Capabilities Covered:

- Countermeasures
- Neutralization
- Detection
- Jammers
- Explosive Ordnance Disposal (EOD)
- Neutralizing Improvised Explosive Devices (NIED)

End Users Covered:

- Homeland Security
- Military

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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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- 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

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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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