

CBRN Defense Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Chemical, Biological, Radiological, Nuclear, Explosive), By Equipment (Protective Wearables, Respiratory Systems, Detection & Monitoring Systems, Decontamination Systems, Simulators, Information Management Software), By Purpose (Detection, Protection, Decontamination, Simulation and Training), By End Use (Armed Forces, Homeland Security, Civil & Commercial), By Region & Competition, 2021-2031F

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Abstracts

The Global CBRN Defense Market is projected to expand from USD 23.13 Billion in 2025 to USD 32.09 Billion by 2031, achieving a compound annual growth rate of 5.61%. This sector covers specialized protective gear, detection mechanisms, and decontamination products aimed at shielding personnel and vital infrastructure from chemical, biological, radiological, and nuclear dangers. Growth is fueled by rising geopolitical instability, the spread of asymmetric threats, and extensive modernization of national defense systems. For instance, the Aerospace, Security and Defence Industries Association of Europe (ASD) reported a 13.8 percent rise in defense sector turnover to ?183.4 billion in 2024, indicating increased military spending to enhance security preparedness.

Conversely, market growth faces a major hurdle due to the substantial capital needed for researching, developing, and maintaining these sophisticated systems. The elevated

costs associated with advanced technologies establish significant barriers to entry and adoption, particularly for developing countries with restricted defense funds. This economic strain often postpones the acquisition of crucial countermeasures, resulting in preparedness gaps despite the acknowledged need for robust CBRN defense strategies.

Market Driver

Rising global geopolitical tensions and regional conflicts serve as a primary catalyst for the Global CBRN Defense Market. With state and non-state actors expanding their capabilities, nations are forced to modernize defense infrastructures and strategic reserves to discourage potential aggression. This unstable security climate requires immediate government investment in protective gear, advanced sensors, and decontamination units to guarantee readiness against nuclear or chemical incidents. Notably, NATO's June 2024 communique highlighted a 17.9 percent real-term increase in defense spending by European Allies and Canada, while Rheinmetall AG reported a 33 percent year-on-year sales jump in the first half of 2024, demonstrating the industrial surge needed to meet these growing security demands.

At the same time, the market is heavily driven by an intensified focus on biological defense and pandemic readiness. The combination of natural outbreaks and the potential threat of engineered biological agents has hastened the need for sophisticated medical countermeasures and rapid detection systems. Defense bodies and public health agencies are prioritizing scalable therapeutic treatments and advanced bio-surveillance networks to lessen the effects of biological warfare or accidental leaks. For example, Moderna announced in July 2024 that it received a \$176 million award from the U.S. government to speed up mRNA-based pandemic influenza vaccine development, emphasizing the vital capital being funneled into biosecurity and resilience against infectious dangers.

Market Challenge

The significant capital necessary for the research, development, and upkeep of CBRN defense systems poses a major obstruction to market progress. Creating these intricate solutions requires the integration of cutting-edge detection and decontamination technologies, demanding consistent and heavy financial backing. The high expense of innovation compels manufacturers to set premium prices for their systems, establishing a high barrier to entry and restricting adoption rates among buyers with budget constraints.

As a result, this financial strain retards market expansion by prolonging procurement schedules and limiting access for nations operating with smaller defense budgets. Rather than obtaining comprehensive countermeasures, many countries are compelled to depend on outdated systems or postpone modernization initiatives, thereby hindering the global adoption of essential defenses. According to the Aerospace, Security and Defence Industries Association of Europe (ASD), R&D expenditure within the European aerospace and defense sector rose by 9.4 percent to ?25.2 billion in 2024, a figure that underscores the economic difficulties manufacturers encounter, which ultimately leads to higher acquisition costs and impeded market growth.

Market Trends

The incorporation of Artificial Intelligence for predictive threat modeling is transforming the Global CBRN Defense Market by shifting the focus from reactive to proactive strategies. Defense agencies are currently utilizing sophisticated algorithms to interpret complex datasets, facilitating the early detection of biological or chemical irregularities before they intensify. This technological advancement streamlines decision-making and refines countermeasure deployment, ensuring threats are neutralized promptly. In August 2025, Booz Allen Hamilton announced securing a task order with a \$1.58 billion ceiling to supply AI and data science support to the Defense Threat Reduction Agency, signifying the substantial investment in advanced threat prediction capabilities.

Concurrently, the use of autonomous unmanned systems for remote reconnaissance is revolutionizing the way military forces identify and evaluate hazardous settings. By deploying aerial drones and ground robots fitted with highly sensitive sensors, commanders can perform real-time monitoring of contaminated areas without risking personnel safety. These unmanned platforms are becoming essential components of modern defense structures, offering continuous observation and automated hazard reporting from safe distances. For instance, Teledyne FLIR reported in April 2025 that it was awarded a \$74.2 million contract to provide autonomous sensor suites for the Stryker vehicle, highlighting the operational shift toward unmanned CBRN reconnaissance solutions.

Key Market Players

Thales Group

Rheinmetall Defence

Smiths Group PLC

Teledyne FLIR LLC

Bruker Corporation

Avon Protection

Argon Electronics (UK) Ltd

Battelle Memorial Institute

Saab AB

MSA Safety, Inc.

Report Scope

In this report, the Global CBRN Defense Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

CBRN Defense Market, By Type

Chemical

Biological

Radiological

Nuclear

Explosive

CBRN Defense Market, By Equipment

Protective Wearables

Respiratory Systems

Detection & Monitoring Systems

Decontamination Systems

Simulators

Information Management Software

CBRN Defense Market, By Purpose

Detection

Protection

Decontamination

Simulation

Training

CBRN Defense Market, By End Use

Armed Forces

Homeland Security

Civil & Commercial

CBRN Defense Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global CBRN Defense Market.

Available Customizations:

Global CBRN Defense Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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