

Military Helmet Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Material (Original Aramid Fiber Kevlar, Advanced Aramid Fiber, UHMWPE Fiber), By Type (Lightweight Helmet, Modular Integrated Communications Helmet, Enhanced Combat Helmet), By Region & Competition, 2021-2031F

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Abstracts

The Global Military Helmet Market is projected to expand from USD 2.73 Billion in 2025 to USD 4.59 Billion by 2031, reflecting a compound annual growth rate of 9.05%. This sector involves the engineering and manufacturing of protective headgear specifically built to guard combat personnel against ballistic impacts, shrapnel, and blunt force trauma. The primary factors driving this growth include rising geopolitical tensions that demand higher defense spending and the broad adoption of soldier modernization initiatives designed to improve survival rates. Consequently, governments are actively replacing outdated equipment with modular platforms that can support communication devices and night vision peripherals to ensure operational dominance in unstable regions.

One major obstacle limiting widespread adoption is the substantial production cost linked to advanced lightweight materials, which can burden procurement budgets, especially in developing countries. Despite these financial pressures, the industry profits from a strong overall rise in defense investments. As reported by the Aerospace, Security and Defence Industries Association of Europe, the defense sector achieved a turnover of ?183.4 billion in 2024, representing a significant 13.8% increase largely fueled by the urgent need for military readiness and equipment updates.

Market Driver

Rising geopolitical friction and asymmetric security risks act as the primary engines for the Global Military Helmet Market, fundamentally altering procurement priorities. Countries are swiftly boosting defense budgets to address volatile security climates and arm personnel against advancing ballistic dangers. This environment forces governments to prioritize the immediate acquisition of sophisticated protective equipment, moving focus from maintaining stockpiles to ensuring active combat preparedness. According to the Stockholm International Peace Research Institute's 'Trends in World Military Expenditure, 2024' Fact Sheet from April 2025, global military spending hit \$2,718 billion in 2024, a real-term increase of 9.4%, directly supporting the purchase of ballistic helmets designed to survive high-velocity impacts in intense conflict zones.

The execution of Next-Generation Soldier Modernization Programs further drives market expansion by requiring the creation of modular, multi-purpose headgear. Modern helmet designs must now function as central hubs for night vision, communications, and augmented reality data, evolving beyond simple protective shells. For instance, Proactive Investors reported in January 2025 that Avon Technologies PLC secured an order worth roughly \$18 million for the US Army's Next Generation Integrated Head Protection System. These initiatives operate on a massive scale; as noted by Army Recognition in February 2025, Rheinmetall Electronics GmbH won a \$3.1 billion framework contract to update the 'Infantry Soldier of the Future' system, highlighting the immense capital dedicated to integrated survivability platforms.

Market Challenge

The elevated production expenses linked to advanced lightweight materials pose a significant barrier to the expansion of the Global Military Helmet Market. Modern protective headgear increasingly depends on high-performance composites and ballistic fibers to lower weight while preserving structural integrity. However, the intricate manufacturing processes needed to fabricate these materials lead to high unit prices. This pricing structure places substantial pressure on procurement budgets, particularly for emerging economies or nations maintaining large standing armies. As a result, despite the operational necessity for improved protection, defense departments are often forced to scale back acquisitions or extend the service life of obsolete equipment, directly limiting the volume of new market orders.

These cost constraints restrict the market's capacity to fully capitalize on increasing

defense allocations. Even as total funding rises, the high per-unit cost of next-generation helmets means that financial increases do not result in a proportional rise in unit volume. According to the European Defence Agency, defense equipment procurement expenditures across Member States reached a record ?88 billion in 2024. While this demonstrates a strong financial commitment to modernization, the capital-intensive nature of advanced personal protective equipment consumes a large portion of these funds. This creates a bottleneck where the ability to purchase sufficient quantities of modern helmets lags behind available technology, slowing overall market adoption.

Market Trends

The transition to ultra-lightweight polyethylene composites marks a fundamental technological shift in the Global Military Helmet Market, moving beyond legacy aramid solutions to address soldier fatigue and mobility. Manufacturers are increasingly utilizing Ultra-High Molecular Weight Polyethylene (UHMWPE) to achieve significant weight reductions while meeting stringent ballistic standards for protection against high-velocity threats. This material evolution allows defense agencies to deploy headgear that reduces the physical burden on combat personnel during extended operations without compromising structural integrity. As evidence of this shift, Gentex Corporation announced in November 2025 that it secured a contract modification valued at \$38.4 million to continue providing these advanced lightweight systems, validating the sector's rapid migration toward next-generation composite materials.

Simultaneously, there is a decisive trend toward system-level integrated headgear solutions, where helmets are procured as complete ecosystems rather than standalone protective shells. This approach prioritizes the seamless unification of power management, data distribution, and mandible protection into a single architecture, eliminating the integration challenges of disparate accessories. By procuring fully integrated systems, armed forces ensure compatibility between night vision mounts, communication headsets, and respiratory protection, thereby streamlining logistics and enhancing operational readiness. For example, Naval Technology reported in August 2025 that Galvion secured a contract worth approximately \$131 million to supply these Integrated Helmet Systems to the U.S. Marine Corps, underscoring the market's move toward holistic, multi-capability headborne platforms.

Key Market Players

DuPont de Nemours, Inc

3M Company

ARMORSOURCE, LLC

MKU Limited

Honeywell International Inc.

Revision Inc

Point Blank Enterprises, Inc

Gentex Corporation

BAE Systems plc

Indian Armour Systems Pvt. Ltd

Report Scope

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

Military Helmet Market, By Material

Original Aramid Fiber Kevlar

Advanced Aramid Fiber

UHMWPE Fiber

Military Helmet Market, By Type

Lightweight Helmet

Modular Integrated Communications Helmet

Enhanced Combat Helmet

Military Helmet 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 Military Helmet Market.

Available Customizations:

Global Military Helmet 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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