

Asia Pacific Counter IED Market By Capability (Detection, Counter Measures), By Deployment (Vehicle-Mounted, Hand-Held), By Country, Competition, Forecast & Opportunities, 2020-2030F

<https://marketpublishers.com/r/A7A79D33A2EEEN.html>

Date: September 2025

Pages: 135

Price: US\$ 4,000.00 (Single User License)

ID: A7A79D33A2EEEN

Abstracts

Market Overview:

Asia Pacific Counter IED Market was valued at USD 598.83 Million in 2024 and is expected to reach USD 749.88 Million by 2030 with a CAGR of 3.82% during the forecast period. Asia Pacific Counter IED market is witnessing robust growth driven by the increasing sophistication of improvised explosive devices and the urgent need for enhanced force protection and civilian safety. Rising investments in advanced detection, neutralization, and disposal technologies are fueling demand for integrated counter-IED solutions that combine sensors, robotics, and intelligence systems. Trends shaping the market include the adoption of unmanned ground and aerial vehicles for remote detection, the integration of AI and machine learning for threat prediction, and modular systems that allow rapid deployment across diverse operational scenarios.

Market Drivers

Rising Defense and Security Investments

Defense forces across the Asia Pacific region are undergoing extensive modernization initiatives to strengthen the survivability and operational effectiveness of their aircraft fleets. Governments are allocating higher budgets to procure advanced technologies that integrate sensors, radars, communication systems, and electronic countermeasures into unified platforms. Aircraft survivability equipment plays a pivotal role in these programs by replacing outdated systems with solutions capable of

countering modern threats, including advanced missile systems, electronic warfare, and cyberattacks. The modernization focus ensures that aircraft are equipped with resilient, real-time threat detection and countermeasure capabilities, enhancing mission readiness and survivability. Geopolitical complexities and the need to maintain air superiority have further accelerated investments in next-generation protection systems. For instance, in 2025, Asia-Pacific defence spending reached USD 632.2 billion, rising 5.1% in real terms, with China accounting for USD 291.8 billion (46.1%) and core US allies Japan, South Korea, Taiwan, and Australia spending USD 181.1 billion (28.6%). When including Singapore, the Philippines, and Thailand, the US-aligned total rises to USD 211.0 billion (33.3%). Growth among the four main US partners slowed to 2.2% in 2025, following a record 13.2% spike in 2023, driven largely by Japan and South Korea's double-digit increases.

Key Market Challenges

High Cost of Advanced Counter-IED Solutions

The procurement and deployment of state-of-the-art counter-IED systems involve significant financial investment, posing a challenge for security agencies and governments with budget constraints. Advanced detection devices, robotics, and AI-integrated platforms are expensive to manufacture, purchase, and maintain. Specialized training for personnel adds further costs, as operators must be skilled in handling complex equipment and interpreting sensor data accurately. Maintenance and calibration of sensitive detection instruments require continuous funding, making long-term sustainability a critical concern. Smaller organizations and regional forces may find it difficult to acquire the latest systems, limiting market penetration in some sectors.

Key Market Trends

Adoption of Robotics and Unmanned Platforms

The use of unmanned ground and aerial vehicles is transforming counter-IED operations by enabling remote detection and disposal of explosive devices. Robotics reduce the need for human operators in high-risk zones, improving safety and operational efficiency. Autonomous systems can navigate complex terrains, identify threats using sensors and cameras, and relay real-time data to command centers for rapid decision-making. Drones equipped with imaging and chemical detection capabilities enhance situational awareness, while robotic arms and bomb disposal units neutralize explosives with precision. Integration with AI allows these platforms to adapt

to evolving threat patterns and optimize operational paths. Modular designs enable quick deployment in urban, rural, or battlefield environments, ensuring versatility. Robotics also facilitate post-blast investigation, mapping, and intelligence collection. For instance, India's defense expenditure reached \$86.1 billion in 2024, positioning it as the 5th largest global spender. The budget saw a 1.6% year-on-year increase, reflecting a steady growth trajectory. Strategic focus areas remain modernization of armed forces and maintaining a balance of power against China and Pakistan, with emphasis on strengthening indigenous capabilities and operational readiness across land, air, and naval domains.

Key Market Players

Lockheed Martin Corporation

L3Harris Technologies Inc.

Elbit Systems Ltd

Northrop Grumman Corporation

Thales S.A.

Saab AB

Chemring Group PLC

Allen-Vanguard Corporation

Israel Aerospace Industries Ltd

QinetiQ Group PLC

Report Scope:

In this report, Asia Pacific Counter IED Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Asia Pacific Counter IED Market, By Capability:

Asia Pacific Counter IED Market By Capability (Detection, Counter Measures), By Deployment (Vehicle-Mounted, H...

Detection

Counter Measures

Asia Pacific Counter IED Market, By Deployment:

Vehicle-Mounted

Hand-Held

Asia Pacific Counter IED Market, By Country:

China

India

Japan

Indonesia

Thailand

South Korea

Australia

Rest of APAC

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in Asia Pacific Counter IED Market.

Available Customizations:

Asia Pacific Counter IED Market report with the given market data, TechSci Research offers customizations according to the company's specific needs. The following

Asia Pacific Counter IED Market By Capability (Detection, Counter Measures), By Deployment (Vehicle-Mounted, H...

customization options are available for the report:

Company Information

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

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