

Counter-IED Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Capability (Detection, Counter Measures), By Deployment (Vehicle-Mounted, Hand-Held), By Region & Competition, 2020-2030F

<https://marketpublishers.com/r/CD11849A03CBEN.html>

Date: February 2025

Pages: 185

Price: US\$ 4,500.00 (Single User License)

ID: CD11849A03CBEN

Abstracts

The global Counter-Improvised Explosive Device (C-IED) market was valued at USD 2.21 billion in 2024 and is projected to reach USD 2.59 billion by 2030, growing at a compound annual growth rate (CAGR) of 2.71% during the forecast period. This market is experiencing significant growth, driven by the rising frequency of terrorist attacks and the evolving nature of asymmetric warfare. The increasing need to protect military personnel, critical infrastructure, and civilians from the growing threat of IEDs is driving the demand for advanced countermeasures. Governments and defense organizations are investing in technologies designed to detect, neutralize, and mitigate the impact of IEDs. This shift in defense strategies has led to the adoption of cutting-edge technologies such as unmanned ground vehicles, robotics, and advanced sensor systems, which are transforming counter-IED operations.

A key trend in the market is the advancement of detection and neutralization technologies. Innovations in radar systems, ground-penetrating radar (GPR), and chemical sensors are improving the accuracy and effectiveness of IED detection. Another significant trend is the increasing investment in research and development to create solutions that can rapidly adapt to emerging threats. The rise of machine learning and artificial intelligence (AI) is also driving the development of smarter systems capable of analyzing data in real-time to predict and prevent potential IED threats. Furthermore, the integration of communication technologies has facilitated seamless coordination between military units, ensuring timely responses to IED threats.

Despite the market's growth, several challenges persist. One of the primary obstacles is the continuous adaptation of insurgent tactics, which makes it difficult for defense systems to stay ahead of evolving threats. Counter-IED systems must constantly adapt to detect and neutralize a broader range of explosive devices, requiring significant investment in technology and training. Additionally, the high cost of advanced C-IED systems presents a challenge, particularly for defense organizations with constrained budgets. The complexity of operating in diverse terrains and environments further complicates the effectiveness of countermeasures, underscoring the need for flexible and adaptable solutions that can be deployed across various settings.

Market Drivers

Rising Threat of Terrorism

The growing threat of terrorism is a major driver of the Counter-IED market. Terrorist and insurgent groups increasingly rely on IEDs due to their low cost, ease of deployment, and effectiveness in destabilizing regions. IEDs have a catastrophic impact, not only on military personnel but also on civilian populations and infrastructure. Governments and armed forces are investing in technologies to detect, neutralize, and prevent these attacks, recognizing that countering IEDs is a key component of modern defense strategies. The unpredictable nature of IED deployment increases the need for comprehensive solutions. As insurgents refine their tactics, countermeasures must evolve to address new challenges, driving ongoing innovation in detection and neutralization technologies. The growth of global terrorism and its impact on national security continues to fuel demand for advanced Counter-IED systems. For example, the Armed Conflict Location & Event Data Project (ACLED) reported a sharp increase in global conflict, with 200,000 conflict events in 2024, nearly double the number recorded in 2020, including significant bombings in conflict zones like Ukraine, Gaza, and Myanmar.

Key Market Challenges

Adapting to Evolving IED Threats

One of the most significant challenges in the Counter-IED market is the ongoing evolution of IEDs. Insurgents and terrorists continually adapt their tactics to evade detection, using new materials, technologies, and triggering mechanisms. These methods make it difficult for existing systems to detect all forms of IEDs, especially as

they become smaller, more sophisticated, and easily concealed. The development of 'smart' IEDs, which can use advanced sensors or wireless communication for remote detonation, further complicates traditional detection methods. As the threat of IEDs evolves, Counter-IED systems must continually be updated and enhanced to address new types of devices. This constant technological arms race between insurgents' innovations and defense industry advancements creates a persistent challenge in ensuring the safety of military personnel.

Key Market Trends

Use of Robotics and Unmanned Systems

Robotics and unmanned systems are transforming Counter-IED operations. These technologies are increasingly used to detect and neutralize IEDs without putting personnel at risk. Robots equipped with advanced sensors and cameras can approach suspicious objects, inspect them, and even disarm them remotely. The integration of unmanned aerial vehicles (UAVs) further enhances operational flexibility by enabling aerial reconnaissance to detect potential threats from above. These unmanned systems can cover vast areas quickly and efficiently, making them ideal for detecting hidden IEDs. As technology advances, the use of robotics and unmanned systems will become even more widespread, providing a safer and more effective approach to addressing the IED threat.

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

This report segments the global Counter-IED market into the following categories, along with detailed industry trends:

Counter-IED Market by Capability:

Detection

Countermeasures

Counter-IED Market by Deployment:

Vehicle-Mounted

Hand-Held

Counter-IED Market by Region:

North America

United States

Canada

Mexico

Europe & CIS

France

Germany

Spain

Italy

United Kingdom

Asia-Pacific

China

Japan

India

Vietnam

South Korea

Thailand

Australia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

South America

Brazil

Argentina

Competitive Landscape

This section provides a detailed analysis of the major companies in the global Counter-IED market.

Available Customizations

TechSci Research offers customizations to the Global Counter-IED Market report according to a company's specific requirements. Customization options include:

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

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