

Europe & CIS Riot Control Equipment Market By Product (Personal Protective Equipment, Offensive Equipment), By End User (Law Enforcement, Special Forces), By Country, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Europe & CIS Riot Control Equipment Market was valued at USD 775.23 Million in 2024 and is expected to reach USD 1016.53 Million by 2030 with a CAGR of 4.62% during the forecast period. The Riot Control Equipment market is experiencing steady growth driven by rising demand for non-lethal crowd management solutions, advanced protective gear, and enhanced tactical equipment that ensures operational efficiency and personnel safety. Innovations in materials and technology are producing lightweight, durable shields, batons, and tear gas delivery systems that improve response times and reduce risk to law enforcement personnel. Growing adoption of integrated systems combining surveillance, communication, and riot control tools is creating new opportunities for efficiency and precision in managing civil disturbances. For instance, during the “Block Everything” protests in France, around 200,000 demonstrators took to the streets, with union estimates placing participation above 250,000, leading to 473 arrests and the deployment of nearly 80,000 police officers nationwide, while protesters carried out 812 coordinated actions, including 550 gatherings and 262 blockades that disrupted transport, highways, and urban spaces.

Market Drivers

Rising Demand for Non-Lethal Crowd Management

The increasing frequency of public gatherings, protests, and civil unrest has intensified the need for effective non-lethal crowd management solutions. Law enforcement

agencies are prioritizing equipment that can control crowds without causing permanent harm, creating higher demand for tear gas, rubber bullets, water cannons, and electroshock devices. Modern riot control strategies require equipment that is both effective and safe, ensuring minimal injuries while maintaining order. This shift is influencing procurement decisions and pushing manufacturers to innovate products that meet stringent safety standards. The focus is on delivering reliable performance under challenging conditions, including extreme weather or confined urban spaces, where conventional methods may fail. Agencies are also seeking solutions that can be deployed quickly, reducing response times during sudden escalations.

Technological Advancements in Protective Gear

Advancements in materials science, sensor integration, and wearable technology are transforming riot control protective gear. Modern equipment now combines lightweight composites, impact-resistant fabrics, and ergonomic designs to enhance mobility and reduce fatigue during prolonged operations. Helmets, body armor, and shields are increasingly designed with shock absorption, thermal regulation, and integrated communication systems, improving situational awareness and team coordination in high-risk environments. The use of IoT-enabled devices allows real-time monitoring of stress levels, positioning, and threat proximity, enhancing decision-making during volatile situations. These innovations improve the safety of personnel while maintaining operational efficiency, which is a critical requirement for modern law enforcement and security agencies. For instance, Greece's Ministry of Citizen Protection has launched a \$715 million modernization program, a major increase from its previous \$34.1 million investment, aimed at boosting public safety and border monitoring. The plan includes \$7.7 million for 2,000 body cameras, \$4.4 million for 100 hybrid SUVs, and about \$93.5 million for additional vehicles dedicated to border and immigration enforcement. It also involves deploying drones, thermal imaging, counterfeit detection systems, encrypted communications, and a new national ID system.

Key Market Challenges

Balancing Effectiveness and Safety

Riot control equipment must maintain a delicate balance between operational effectiveness and minimizing harm. Non-lethal devices such as batons, tear gas, and rubber bullets need to control crowds while avoiding severe injuries, permanent disabilities, or fatalities. Designing equipment that achieves this balance is complex, as environmental conditions, crowd behavior, and deployment scenarios vary widely.

Manufacturers face pressure to meet rigorous safety standards and comply with international human rights regulations, while law enforcement agencies require tools that function reliably under extreme stress. Inadequate safety can result in public backlash, legal consequences, and diminished trust in security forces. Simultaneously, overemphasis on safety may reduce the deterrent effect, limiting crowd control efficiency.

Key Market Trends

Smart and IoT-Enabled Equipment

Integration of smart technologies and IoT connectivity is redefining riot control operations. Equipment such as helmets, vests, and shields now feature embedded sensors, GPS tracking, and real-time data transmission to central command centers. This connectivity allows continuous monitoring of personnel location, physiological status, and surrounding threats, enabling rapid decision-making and coordinated responses. Remote monitoring tools and automated alert systems improve situational awareness, reducing risks to both officers and civilians. The trend toward smart devices also supports predictive analytics, crowd behavior modeling, and scenario simulations, enhancing strategic planning for complex deployments.

Key Market Players

CBW Agencia

Desert Wolf

Axon Enterprise, Inc.

PACEM Defense

Genasys Inc.

Safariland LLC

NonLethal Technologies Inc

Blackhawk

J-FORCES Group

Indian Armour Systems

Report Scope:

In this report, Europe & CIS Riot Control Equipment Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Europe & CIS Riot Control Equipment Market, By Product:

Personal Protective Equipment

Offensive Equipment

Europe & CIS Riot Control Equipment Market, By End User:

Law Enforcement

Special Forces

Europe & CIS Riot Control Equipment Market, By Country:

Germany

Russia

France

Spain

Italy

United Kingdom

Poland

Rest of Europe & CIS

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in Europe & CIS Riot Control Equipment Market.

Available Customizations:

Europe & CIS Riot Control Equipment Market report with the given market data, TechSci Research offers customizations according to the 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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