

Less Lethal Ammunition Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Rubber Bullets, Bean Bag Rounds, Polyethylene/Plastic Bullets, OC/CS & Smoke Munitions, Flash Bang Rounds, Paintballs, Others), By Weapon Type (Shotguns, Launchers, Others), By End-Users (Law Enforcement, Military, Self Defense, Others), By Region & Competition, 2019-2029F

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Abstracts

Global Less Lethal Ammunition Market was valued at USD 1.10 Billion in 2023 and is expected to reach USD 1.73 Billion by 2029 with a CAGR of 7.79% during the forecast period. The Global Less Lethal Ammunition Market has experienced significant growth, driven by factors influencing law enforcement, military, and civilian self-defense. Less lethal ammunition includes projectiles and devices that incapacitate or control individuals and crowds without fatal injuries. The growing use of these weapons highlights their effectiveness in reducing fatalities while maintaining control in volatile situations.

Key drivers include rising civil unrest, protests, and riots worldwide, creating a need for non-lethal crowd control methods. Law enforcement agencies face pressure to manage these events while minimizing harm. Technological advancements have also played a crucial role, improving the effectiveness, range, and accuracy of less lethal ammunition. Innovations like rubber bullets, bean bag rounds, and tear gas projectiles have expanded their applications. The increasing focus on human rights and reducing fatalities in conflict situations has led to greater military adoption of less lethal options. For instance, in April 2024, Cymat Technologies Ltd. announced its first commercial

order for non-lethal bullets, placing an order for 21,000 SmartMetal Stabilized Aluminum Foam cylinders with Nobel Sport. This French-based manufacturer will supply the cylinders to the French Armed Forces, with the contract valued at around \$200,000. Testing confirmed that the new bullets are safer, more accurate, and less harmful than existing products.

Key Market Drivers

Increased Focus on Public Safety

The growing emphasis on public safety is a significant driver of the global less lethal ammunition market. Governments and law enforcement agencies worldwide are increasingly adopting less lethal weapons to manage civil unrest, riots, and protests while minimizing fatalities and severe injuries. These non-lethal options offer a balance between maintaining public order and upholding human rights. For instance, rubber bullets, tear gas, and stun grenades are preferred in crowd control scenarios as they are designed to incapacitate without causing permanent harm. The rising incidences of violent protests and riots globally necessitate the adoption of effective crowd management tools. This trend is further supported by public demand for more humane methods of law enforcement, driving the market for less lethal ammunition.

Advancements in Less Lethal Technologies

Technological advancements in less lethal ammunition are fueling market growth. Innovations in materials and design have led to the development of more effective and safer non-lethal projectiles. For example, advancements in rubber and foam materials have resulted in projectiles that can deliver the intended impact without penetrating the skin, reducing the risk of serious injury. Improvements in delivery mechanisms, such as more accurate and controllable launchers, enhance the effectiveness of these weapons in various scenarios. The integration of smart technologies, such as ammunition with tracking capabilities and enhanced targeting systems, also contributes to the market's expansion. These technological innovations ensure that law enforcement and security personnel can rely on less lethal options for precise and controlled application, thereby promoting their widespread adoption.

Growing Adoption by Military and Law Enforcement Agencies

The increasing adoption of less lethal ammunition by military and law enforcement agencies is another critical driver. These agencies recognize the need for non-lethal

options to handle various operational scenarios, including peacekeeping missions, domestic disturbances, and situations involving unarmed civilians. The use of less lethal ammunition allows for a more flexible response, providing options that can de-escalate potentially volatile situations without resorting to lethal force. This is particularly important in urban environments and areas with dense civilian populations where the use of lethal force could lead to unintended casualties and significant collateral damage. The adoption of less lethal ammunition is supported by training programs and policies that emphasize de-escalation and the use of force continuum, aligning with contemporary law enforcement strategies focused on reducing harm and preserving life.

Key Market Challenges

Regulatory and Ethical Concerns

Regulatory and ethical concerns pose significant challenges to the global less lethal ammunition market. The use of less lethal weapons is subject to stringent regulations and oversight by various national and international bodies to prevent misuse and ensure ethical deployment. These regulations often vary widely across different regions, creating a complex landscape for manufacturers and users to navigate. Ethical concerns arise from incidents where less lethal weapons have caused serious injuries or fatalities, leading to public scrutiny and calls for stricter controls. Advocacy groups and human rights organizations frequently campaign against the use of such weapons, arguing that they can still inflict considerable harm and are sometimes used excessively or inappropriately by law enforcement. These regulatory and ethical challenges can result in delays, increased cost for compliance, and potential restrictions on the deployment of less lethal ammunition, hindering market growth.

Limited Effectiveness in Certain Situations

The limited effectiveness of less lethal ammunition in certain situations is another challenge impacting the market. While designed to incapacitate without causing permanent harm, these weapons can sometimes fail to achieve the desired effect, especially in high-stress or dynamic environments. For instance, factors such as range, accuracy, and environmental conditions can significantly influence the performance of less lethal projectiles. In some cases, individuals under the influence of drugs or experiencing extreme agitation may not respond to less lethal options as intended, necessitating the use of more forceful measures. The variability in human response to pain and incapacitation means that outcomes can be unpredictable. This inherent limitation can reduce the confidence of law enforcement and military personnel in

relying solely on less lethal ammunition, thereby impacting its adoption and effectiveness in operational scenarios.

High Cost and Budget Constraints

The high cost associated with less lethal ammunition and related equipment present a considerable challenge to market expansion. Developing and manufacturing advanced less lethal technologies involve significant research and development investments, which can drive up the prices of these products. Law enforcement and military budgets are often constrained, with resources allocated to a wide range of priorities. Allocating sufficient funds for less lethal ammunition can be difficult, especially in regions facing economic challenges or where security budgets are limited. Ongoing training and maintenance cost for the effective use of less lethal weapons add to the financial burden. These economic constraints can limit the procurement and deployment of less lethal options, particularly in smaller agencies or developing countries, thus impeding market growth and accessibility.

Key Market Trends

Integration of Advanced Technologies

The integration of advanced technologies is a notable trend in the global less lethal ammunition market. Manufacturers are increasingly incorporating cutting-edge technologies to enhance the effectiveness, safety, and precision of less lethal weapons. Innovations such as smart projectiles equipped with sensors and tracking capabilities are becoming more common. These advanced features allow for better targeting and controlled deployment, reducing the risk of unintended injuries. Developments in materials science are leading to the creation of more effective and safer ammunition, such as non-lethal rounds that minimize the risk of serious injury while ensuring incapacitation. The use of digital technologies for training, including virtual reality (VR) simulations, is also on the rise, providing law enforcement and military personnel with realistic and immersive training experiences. This trend towards technological sophistication is driving the evolution of less lethal ammunition, making it more reliable and effective for various operational scenarios. For instance, in November 2023, Fabrique Nationale Herstal (FN Herstal), a prominent European arms manufacturer, introduced the Smart ProtectoR-303T, an innovative less-lethal AI smart-gun. This advanced weapon incorporated artificial intelligence and imaging sensors to avoid firing projectiles at individuals' heads, thereby minimizing the risk of severe injuries. The Smart ProtectoR-303T utilized 18mm elastomer projectiles that disintegrated on impact,

categorizing it as a kinetic impact projectile weapon.

Increased Demand for Non-Lethal Home Defense Solutions

The growing demand for non-lethal home defense solutions is shaping the market landscape. As concerns about personal safety and home security rise, especially in urban areas, there is an increasing interest in less lethal options for civilian use. Consumers are seeking alternatives to traditional firearms that can provide a means of self-defense without the potential for fatal outcomes. Less lethal ammunition, such as rubber bullets, pepper spray projectiles, and stun rounds, offers a viable solution for home defense. This trend is further supported by changing regulations in some regions that restrict the use of lethal firearms for personal protection, prompting individuals to explore non-lethal alternatives. The market is responding with a range of products designed specifically for civilian use, emphasizing ease of use, effectiveness, and safety, thereby expanding the consumer base for less lethal ammunition.

Expansion into New Markets and Applications

The expansion into new markets and applications is a significant trend driving the global less lethal ammunition market. While historically focused on law enforcement and military sectors, the use of less lethal weapons is now extending to other areas such as private security, corrections, and wildlife control. Private security firms are increasingly adopting less lethal options to safeguard assets and personnel across various environments, including corporate settings, event security, and critical infrastructure protection. In the corrections sector, less lethal ammunition is being utilized to manage inmate populations and address disturbances without resorting to lethal force. Less lethal solutions are being applied in wildlife control to safely deter or relocate animals without causing harm. This diversification into new sectors and applications is broadening the market's scope and creating new opportunities for growth and innovation in less lethal technologies.

Segmental Insights

Product Insights

Rubber bullets dominated the segment in the global less lethal ammunition market due to their versatility, effectiveness, and widespread use in various law enforcement and military applications. These projectiles are designed to incapacitate or control individuals without causing fatal injuries, making them an ideal choice for crowd control,

public safety, and self-defense situations. One of the primary reasons for rubber bullets' dominance is their ability to cause pain and temporary incapacitation while minimizing the risk of fatality. Unlike traditional ammunition, rubber bullets are less likely to penetrate the body, reducing the chances of severe injury or death. This makes them a preferred option for managing protests, riots, and civil unrest, where maintaining order while protecting public safety is critical.

Technological advancements have further enhanced the effectiveness of rubber bullets. Modern designs have improved accuracy, range, and impact force, allowing law enforcement agencies to use them in a wide range of scenarios. The development of various rubber bullet types, such as baton rounds and flexible projectiles, has increased their applicability for different crowd control situations. Another factor driving the growth of the rubber bullet segment is the increasing global emphasis on human rights and the need for non-lethal methods of conflict resolution. Rubber bullets align with these values by offering a solution that minimizes harm while effectively managing crowds or diffusing volatile situations. This makes them a key choice for law enforcement and military forces focused on ensuring public safety without resorting to lethal force.

Regional Insights

North America dominated the global less lethal ammunition market due to several key factors, including advanced law enforcement infrastructure, high adoption rates of non-lethal weapons, and stringent regulatory frameworks. The region, particularly the United States, has seen widespread use of less lethal ammunition in both law enforcement and military applications, driving market growth.

One of the primary reasons North America leads is the increasing demand for non-lethal crowd control methods. The region experiences frequent civil unrest, protests, and large-scale public events, creating a growing need for effective, humane ways to manage crowds and maintain order. Less lethal ammunition, such as rubber bullets and bean bag rounds, is often preferred for these situations, as it reduces the risk of fatal injuries while ensuring control.

Technological advancements in less lethal ammunition, including improved accuracy and effectiveness, have fueled adoption in North America. Law enforcement agencies are increasingly using these weapons for various scenarios, from riots to suspect apprehension. This growing reliance on less lethal methods aligns with the region's focus on public safety and human rights.

Regulatory support in North America also contributes to the market's dominance. Local, state, and federal regulations increasingly prioritize the use of non-lethal weapons to minimize casualties and prevent unnecessary fatalities. This has led to higher investments in less lethal ammunition technologies.

The presence of key players in the region, along with ongoing research and development efforts, continues to enhance the availability and effectiveness of less lethal ammunition, reinforcing North America's leadership in this market.

Key Market Players

Nonlethal Technologies Inc.

Lightfield Ammunition, Corp.

Combined Systems, Inc

Safariland LLC

Mace Security International Inc.

Axon Enterprise, Inc.

Smith & Wesson Brands, Inc.

AMTEC Less-Lethal Systems, Inc.

B&T AG

Point Blank Enterprises, Inc.

Report Scope:

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

Less Lethal Ammunition Market, By Product:

Rubber Bullets

Bean Bag Rounds

Polyethylene/Plastic Bullets

OC/CS & Smoke Munitions

Flash Bang Rounds

Paintballs

Others

Less Lethal Ammunition Market, By Weapon Type:

Shotguns

Launchers

Others

Less Lethal Ammunition Market, By End-Users:

Law Enforcement

Military

Self Defense

Others

Less Lethal Ammunition Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

France

Germany

Spain

Italy

United Kingdom

Rest Of Europe

Asia-Pacific

China

Japan

India

Vietnam

South Korea

Thailand

Australia

Rest of Asia-Pacific

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

South America

Brazil

Argentina

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Less Lethal Ammunition Market.

Available Customizations:

Global Less Lethal Ammunition 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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