

# **Military Gas Mask Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Mask Type (Full-face Gas Masks, Half-face Gas Masks), By Product Type (Non-Powered Respirators, Powered Respirators), End-User (Military, First Responders), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Military Gas Mask Market is projected to expand from USD 1.51 Billion in 2025 to USD 2.12 Billion by 2031, registering a CAGR of 5.82%. These respiratory protection devices are designed to filter chemical, biological, radiological, and nuclear particulates from inhaled air, ensuring soldier survival in contaminated environments. The primary factors driving market growth include the systematic modernization of national defense inventories and rising cross-border geopolitical tensions, which urge governments to improve troop preparedness against non-conventional warfare threats. Consequently, consistent procurement cycles are necessary to replace aging stockpiles and outfit forces with reliable individual protective equipment.

However, market expansion faces a significant challenge due to the logistical complexity and high costs involved in maintaining supply chains for specialized filtration materials and managing the strict shelf-life of consumable canisters. This procurement landscape is heavily influenced by broader defense budget trends that fund these acquisitions. According to the Stockholm International Peace Research Institute, global military expenditure rose by 9.4 percent in 2024 to reach \$2.718 trillion, indicating a heightened prioritization of defense readiness that supports the continued demand for essential CBRN protection systems.

## **Market Driver**

The escalating threat of Chemical, Biological, Radiological, and Nuclear (CBRN) warfare acts as a critical catalyst for the Global Military Gas Mask Market, prompting nations to overhaul their defensive strategies. As geopolitical conflicts increasingly carry the risk of non-conventional attacks, defense agencies are driven to accelerate the procurement of advanced respiratory protection to ensure personnel survivability in contaminated zones. This urgency is reflected in recent procurement activities; according to Avon Technologies plc, in May 2024, the company secured a contract worth up to \$38 million from the UK Ministry of Defence to supply General Service Respirators, a decision reinforced by the operational necessity to counter chemical agents in modern combat theaters.

Simultaneously, the growth of global defense budgets provides the essential financial infrastructure to support these large-scale modernization programs. Governments are allocating record funding levels to equipment upgrades, prioritizing the replacement of legacy safety gear with integrated solutions that offer improved fields of view and reduced respiratory burden. According to NATO, in February 2024, European Allies were projected to invest a combined total of \$380 billion in defense, marking the first time this collective figure reached 2% of their combined GDP. This fiscal growth directly creates opportunities for specialized manufacturers; for instance, according to MSA Safety, in November 2024, the firm won a contract valued at \$33 million to provide next-generation respiratory protective equipment to the US Coast Guard.

## **Market Challenge**

The primary obstacle hindering the growth of the Global Military Gas Mask Market is the logistical complexity and high operational cost associated with maintaining supply chains for specialized filtration materials and managing the strict shelf-life of consumable canisters. Gas masks depend on specific chemical components that are expensive to manufacture and transport, while the finite lifespan of filtration units requires frequent, capital-intensive replacement cycles. This continuous financial burden compels defense departments to direct significant resources toward sustaining existing inventories rather than acquiring new systems, thereby limiting overall market expansion.

These procurement inefficiencies often lead to modernization delays, as manufacturers struggle to align production with fluctuating government funding. This strain on the industrial base is highlighted by recent industry findings. According to the National Defense Industrial Association, in 2025, 54 percent of private sector respondents

identified supply chain challenges as a critical issue facing the defense industrial base. This metric underscores how widespread logistical hurdles and material shortages directly hamper the ability of manufacturers to deliver essential CBRN protection equipment on schedule, ultimately restricting the market's capacity to meet rising global demand.

## **Market Trends**

The shift toward modular and interoperable respiratory system architectures is reshaping the market as defense agencies prioritize equipment that integrates seamlessly with broader soldier systems. Modern procurement strategies now favor 'headborne systems' where the gas mask functions as a component within a modular suite involving ballistic helmets, communications, and night vision optics, rather than as a standalone device. This interoperability ensures that respiratory protection does not compromise the usage of other critical tactical gear, thereby maintaining operational lethality. Emphasizing this move toward integrated solutions, according to Gentex Corporation, in November 2025, the company secured a contract option worth \$38.4 million to supply the U.S. Army with advanced helmet systems designed for such scalable, open-architecture integration.

Concurrently, there is a distinct focus on reduced physiological burden and breathability enhancement, driving the adoption of lightweight materials and low-profile designs. Manufacturers are increasingly utilizing advanced composites and compact powered air-purifying respirators (PAPRs) to minimize the physical strain on soldiers operating in high-stress CBRN environments. This trend addresses the need for protective gear that offers extended operational duration without inducing fatigue or heat stress. Highlighting the demand for these next-generation survivability solutions, according to AirBoss Defense Group, in November 2025, the firm received a new order valued at up to \$8.1 million from the Canadian Department of National Defense to deliver specialized personal protective equipment consistent with these modernization requirements.

## **Key Market Players**

3M Company

MIRA Safety, LLC

Avon Polymer Products Limited

Venture Digital, LLC

Shalon Chemical Industries Ltd

Duram Mask

MSA Worldwide, LLC

Dragerwerk AG & Co. KGaA

All Safe Industries, Inc.

eAccess Solutions, Inc

## **Report Scope**

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

Military Gas Mask Market, By Mask Type

Full-face Gas Masks

Half-face Gas Masks

Military Gas Mask Market, By Product Type

Non-Powered Respirators

Powered Respirators

Military Gas Mask 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 Gas Mask Market.

## **Available Customizations:**

Global Military Gas Mask 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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