

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

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## Abstracts

North America Riot Control Equipment Market was valued at USD 2.85 billion in 2024 and is anticipated to grow USD 3.67 billion by 2030 with a CAGR of 4.36% during the forecast period. The North America Riot Control Equipment market is experiencing significant growth driven by rising concerns over civil unrest, protests, and security threats. This market includes a wide range of non-lethal products designed to maintain public order while ensuring safety for both authorities and civilians. Key equipment includes riot shields, helmets, gas masks, rubber bullets, tear gas, and crowd control vehicles. Technological advancements in protective gear, such as enhanced visibility and mobility features, are also contributing to market growth. Additionally, increasing law enforcement agency budgets and the demand for improved crowd management solutions are key factors driving the market forward. In 2023, the U.S. military allocated around USD820.3 billion, accounting for approximately 13.3% of the federal budget. In March 2023, the Department of Defense (DoD) proposed a USD842.0 billion budget for 2024, reflecting a 2.6% increase. This rising defense expenditure serves as a key driver for the growth of the riot control equipment market.

### Key Market Drivers

#### Rising Frequency of Civil Unrest and Protests

One of the main factors propelling the demand for riot control equipment in North America is the increasing frequency of civil unrest, protests, and demonstrations. Over

the past decade, there has been a noticeable rise in social and political movements, particularly in response to issues such as racial injustice, police reform, climate change activism, and economic inequality. High-profile incidents, such as protests following police violence or governmental decisions, have spurred widespread civil disobedience and demonstrations in various urban centers.

As these protests sometimes escalate into violent confrontations between demonstrators and law enforcement, the need for effective riot control equipment has become more pressing. Riot shields, tear gas, rubber bullets, and sound cannons are increasingly utilized to manage these crowds, reduce potential injuries, and maintain public order. The unpredictability of these events, combined with their rising frequency, makes it essential for law enforcement agencies to stay equipped with modern, reliable riot control tools that can handle large crowds and prevent violent outcomes.

### Growing Focus on Non-Lethal Law Enforcement Tools

The growing emphasis on human rights and public safety has led to a significant shift in the way law enforcement agencies approach riot control. The focus has gradually shifted from using lethal force to the use of non-lethal alternatives, a transition that has driven the demand for riot control equipment. This approach is more in line with public expectations for law enforcement to exercise restraint and minimize harm during crowd control operations.

Riot control equipment such as rubber bullets, bean bag rounds, tear gas, water cannons, and flashbang grenades are commonly used as non-lethal means of dispersing crowds without causing permanent harm. This shift is not only a response to concerns over police brutality but also a proactive measure to reduce the potential for civil lawsuits and public backlash against excessive use of force. The growing awareness around human rights and the ethical concerns of using deadly force during law enforcement operations are driving the increased adoption of these less harmful yet effective control measures.

### Technological Advancements in Riot Control Equipment

The North American riot control equipment market is also being shaped by rapid technological advancements that enhance the effectiveness, precision, and safety of riot control tools. Innovations in technology have led to the development of more sophisticated crowd control solutions, which offer improved operational efficiency and reduced risks to both law enforcement officers and civilians.

For instance, the integration of advanced surveillance and monitoring systems, such as drones and body cameras, allows law enforcement to assess situations in real-time and make more informed decisions on deploying riot control equipment. Drones equipped with cameras provide aerial views of protestors and help officers monitor crowd movements, allowing for targeted deployment of crowd control tools without the need for excessive force.

## Key Market Challenges

### Concerns Over Human Rights Violations

One of the most significant challenges facing the riot control equipment market in North America is the increasing concern over human rights violations during the use of such equipment. Public protests, especially in the wake of police violence and civil unrest, have raised critical questions about the ethics of using force to control crowds. Instances of excessive force, including the use of tear gas, rubber bullets, and other riot control measures, have drawn widespread public criticism and prompted calls for reform.

The deployment of certain riot control measures, such as tear gas and rubber bullets, has been linked to injuries and fatalities, raising alarm among human rights organizations, activists, and the general public. In recent years, protests over police brutality have highlighted these concerns, and the use of force by law enforcement agencies is under increasing scrutiny. Legal and public pressures are growing, demanding a balance between maintaining public order and safeguarding individuals' rights to protest peacefully.

### Public Backlash and Scrutiny of Law Enforcement Practices

As public scrutiny of law enforcement practices increases, the riot control equipment market faces a challenge in maintaining public trust. High-profile incidents of violence involving riot control measures have led to significant public backlash against police forces, which can lead to protests, political movements, and changes in laws and regulations regarding law enforcement behavior. The negative public perception of certain riot control equipment can result in a demand for policy changes, reductions in funding for police departments, and the rethinking of crowd control tactics.

The backlash surrounding the use of force and controversial equipment has the

potential to impact the market, especially in terms of how these tools are perceived by the public and the legal system. Public protests against the militarization of police forces and the aggressive use of riot control tools have created an environment where law enforcement agencies are under increasing pressure to reform their approaches.

## Key Market Trends

### Integration of Technology for Smarter Crowd Control

The integration of advanced technologies into riot control equipment is another prominent trend shaping the market. As law enforcement agencies look for more effective ways to monitor, assess, and manage crowds, there is a growing reliance on technology to enhance operational efficiency and decision-making. These technological advancements provide law enforcement with tools to respond more accurately and efficiently to changing crowd dynamics during protests or riots.

Drones are becoming an increasingly common tool for surveillance during large-scale protests. These unmanned aerial vehicles (UAVs) offer a bird's-eye view of crowds, allowing law enforcement agencies to monitor movements in real time and deploy riot control measures with precision. Drones equipped with cameras and thermal imaging also help law enforcement identify potential threats or aggressive individuals, which can lead to a more focused and targeted response.

Another key technological development is the use of body cameras and augmented reality (AR) systems. Body cameras are used to capture real-time footage of law enforcement interactions with protestors, which can be used for accountability, transparency, and evidence collection. AR systems, on the other hand, are being integrated into riot helmets and other equipment to provide officers with real-time data and situational awareness, enabling them to make better decisions on the ground.

### Focus on Crowd Behavior Prediction and Prevention

In line with the growing emphasis on non-lethal methods, there is an increasing trend toward predicting and preventing violent behavior in crowds before it escalates into a full-scale riot. Predictive analytics and artificial intelligence (AI) are becoming essential tools in helping law enforcement agencies assess the likelihood of a protest turning violent, allowing for proactive measures to be taken.

AI-powered crowd management systems can analyze data from multiple sources—such

as social media, past protest behaviors, and on-the-ground intelligence— to predict where tensions might arise during demonstrations. These systems can identify potential flashpoints and offer actionable insights that help law enforcement allocate resources more effectively, ensuring that the right riot control equipment is deployed at the right time and place. Predictive systems also provide valuable information for planning crowd control strategies, which can significantly reduce the likelihood of violent clashes.

By using AI and big data, law enforcement agencies can better understand the dynamics of protests and engage in more informed decision-making, which can help prevent violent confrontations before they escalate. This trend not only improves the effectiveness of riot control efforts but also enhances the safety of officers and civilians alike.

### Increased Regulation and Accountability

As the public becomes more aware of the ethical implications surrounding the use of riot control equipment, there is a growing trend toward increased regulation and accountability for law enforcement agencies. Governments and regulatory bodies are introducing new policies and frameworks to ensure that the use of riot control measures is proportionate, transparent, and respects individuals' rights.

For example, several jurisdictions are implementing stricter guidelines on the use of chemical agents like tear gas, rubber bullets, and pepper spray. These regulations aim to reduce the potential for injury and ensure that force is used only when absolutely necessary. In some areas, public protests and movements have led to bans or restrictions on the use of certain riot control equipment, such as tear gas or rubber bullets, further pressuring law enforcement to adopt safer alternatives.

### Segmental Insights

#### Product Type Insights

Personal Protective Equipment (PPE) was the dominating segment in the North America Riot Control Equipment market due to its critical role in safeguarding law enforcement officers during crowd control operations. Items like helmets, body armor, shields, and gas masks are essential for officers' protection against physical harm, projectiles, and harmful chemicals. The increasing need for enhanced officer safety during high-risk operations, such as protests and riots, has driven the demand for advanced PPE. Moreover, the rising focus on non-lethal crowd control methods and

public scrutiny on police conduct further boosts the growth of this segment in the market.

## Country Insights

The United States was the dominating region in the North America Riot Control Equipment market, driven by its large-scale law enforcement agencies and frequent need for crowd control during protests and civil unrest. The U.S. has a high demand for advanced riot control solutions, such as non-lethal weapons, surveillance technologies, and protective gear, in response to growing public concerns over safety and police accountability. Moreover, increasing government investments in modernizing law enforcement capabilities and the development of innovative crowd management technologies further solidify the U.S.'s dominant position in the market, setting trends for other North American regions.

## Key Market Players

Central Lake Armor Express, Inc.

Aspetto Inc.

Combined Systems, Inc

Axon Enterprise, Inc.

Safariland, LLC

NonLethal Technologies, Inc.

Byrna Technologies Inc.

PACEM Defense, LLC

Paulson Manufacturing Corporation

Rheinmetall AG

## Report Scope:

*North America Riot Control Equipment Market By Product Type (Personal Protective Equipment, Offensive Equipmen...*

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

North America Riot Control Equipment Market, By Product Type:

Personal Protective Equipment

Offensive Equipment

North America Riot Control Equipment Market, By End User:

Law Enforcement

Special Forces

North America Riot Control Equipment Market, By Country:

United States

Canada

Mexico

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the North America Riot Control Equipment Market.

Available Customizations:

North America Riot Control Equipment 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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