

## The Global Counter IED Market 2012–2022



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## 1 Executive Summary

**The global counter IED market is expected to exhibit a steady decline during the forecast period**

The global counter IED market is expected to be worth US\$XX billion in 2012, which will decrease to US\$XX billion by 2022, representing a CAGR of XX% during the forecast period. The demand for counter IED equipment is anticipated to be driven by internal and external security threats, territorial disputes, modernization initiatives, technological innovations, and a substantial demand for counter IED systems for coalition forces in Afghanistan. Cumulatively, the global market is expected to value US\$XX billion during the forecast period. The market is expected to be dominated by North America, followed by Europe and Asia-Pacific. Despite the significant levels of spending in Europe, the region's share of the global market is projected to decrease during the forecast period due to the withdrawal of troops from Afghanistan and public pressure to cut down on defense spending.

In terms of categories, counter IED vehicles is expected to account for the highest proportion of spending in the global counter IED market, followed by electronic countermeasures and detection systems. Counter IED training and Unmanned Systems account for the fourth and fifth largest segments respectively. The demand for counter IED vehicles is anticipated to be higher than other categories because of the need for troops across the world to have high mobility without compromising on survivability. Electronic Countermeasures are expected to witness significant demand due to the growing threat of asymmetrical warfare and significant technological advances in the field. Many of the segments are driven by the need to provide enhanced survivability to military and security forces while dealing with an enemy who is adept at using IEDs as a primary artillery weapon.

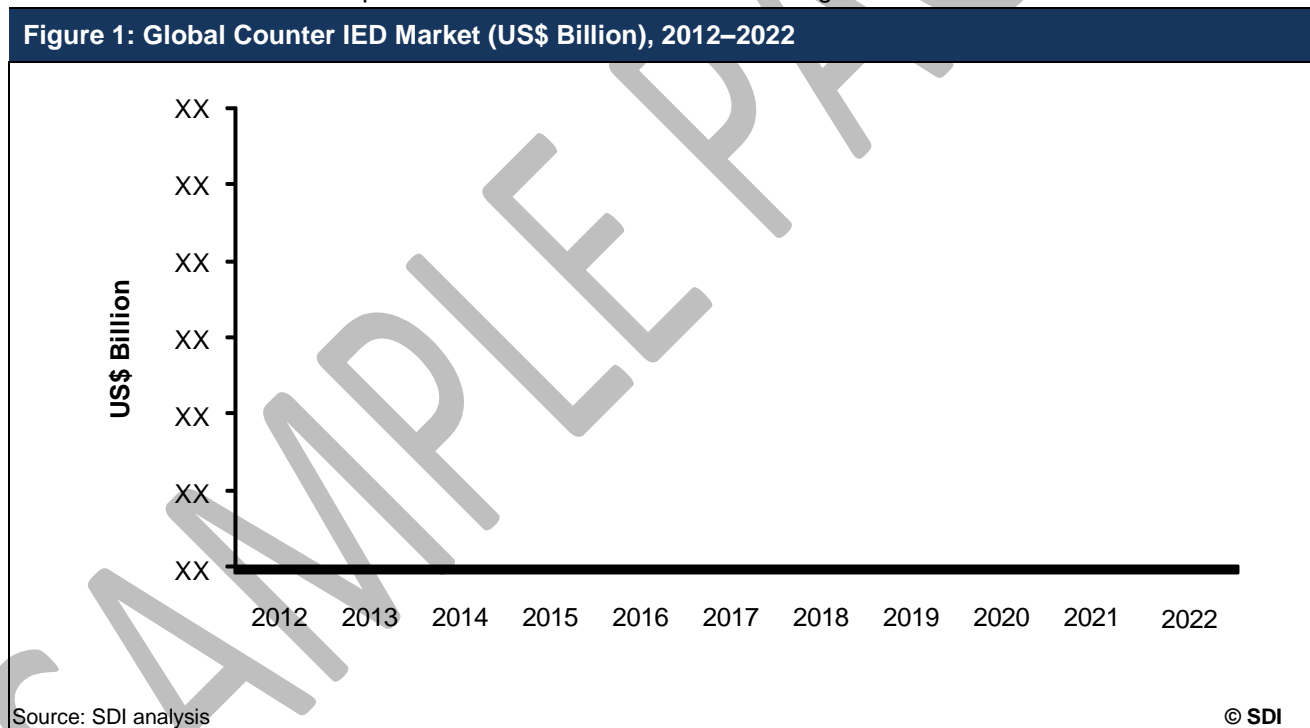
## 2 Global Counter IED Market Size and Drivers

### 2.1 Counter IED Market Size and Forecast 2012–2022

#### 2.1.1 Global counter IED market expected to decline during the forecast period

The global counter IED market is estimated to value US\$XX billion in 2012, and will decrease at a CAGR of -5.59% during the forecast period, to reach US\$XX billion by 2022. The market consists of five categories: counter IED vehicles, electronic countermeasures, detection systems, unmanned systems, and counter IED training. The counter IED vehicles segment is expected to account for XX% of the global counter IED market, followed by the electronic countermeasure segment with a share of XX%. Furthermore, the detection system and counter IED training markets will account for XX% and XX% of the overall counter IED market, whereas unmanned systems will account for the remaining XX% market share. During the forecast period, the cumulative global expenditure on counter IED is expected to reach US\$XX billion.

The chart below shows the expected counter IED market value during 2012–2022:



## The Global Counter IED Market 2012–2022

### 2.2 Global Counter IED Market – Regional Analysis

#### 2.2.1 Counter IED market in North America is expected to decline over the period

North America accounts for the highest spending in the global counter IED market and most of the expenditure can be attributed to the US, with Canada accounting for a small share. Both the US and Canada have allocated a major portion of their counter IED budget towards saving the lives of soldiers deployed in Iraq and Afghanistan for the peace keeping missions. A major share of expenditure is focused on areas such as counter IED vehicles, detection systems, electronic jammers and other bomb-foiling technologies, and unmanned systems. The procurement of nearly XX Mine-Resistant, Ambush-Protected (MRAP) vehicles for more than US\$XX billion between 2007 and 2012, accounts for the largest share of counter IED budget of the US.

However, the expenditure on counter IED initiatives is expected to decline with the withdrawal of forces from Iraq and Afghanistan. Furthermore, counter IED programs in the US have been criticized for not having a comprehensive database of all C-IED initiatives, resulting in the duplication and concentration of multiple C-IED initiatives within some areas of development. Additionally, the fiscal constraints in the US, which mean the decrease of the defense budget by US\$XX billion over the next decade, is expected to result in a decrease in fund allocation for the counter IED expenditure. Although the North American market is expected to witness a decline, it still leads the counter IED sector and accounts for XX% of the global market. Europe and Asia are also expected to account for a significant portion of the total counter IED market during the forecast period, with shares of XX% and XX% respectively. Latin America, the Middle East, and Africa cumulatively account for XX% of global counter IED expenditure.

The table below gives a brief overview of the global counter IED market:

Table 1: Global Counter IED Market Overview				
Region	Market in 2012	Market in 2022	Total Market (2012–2022)	Annualized growth/decline (2012–2022)
North America	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Europe	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Asia-Pacific	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Middle East	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Latin America	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Africa	US\$XX billion	US\$XX billion	US\$XX billion	XX%
<b>Total counter IED Market</b>	<b>US\$XX billion</b>	<b>US\$XX billion</b>	<b>US\$XX billion</b>	<b>XX %</b>
Source: SDI analysis				© SDI

## The Global Counter IED Market 2012–2022

### 2.3 Counter IED Sub–Sector Market Size Composition

#### 2.3.1 Counter IED vehicles to account for the highest expenditure in the global counter IED market

The counter IED (C-IED) vehicle category has emerged as the one that is expected to witness the most global spending in the counter IED market. The demand for counter IED vehicles is expected to be driven by the increasing need for the safety of soldiers. Counter IED vehicles provide survivability to combat units by prevailing against anti-tank and improvised explosive devices (IED), and at the same time enable the use of modern sensor and communication technology. According to the Washington Post, nearly XX% of deaths among the US peacekeeping soldiers in Iraq and Afghanistan are IED related. This led the US to initiate the Mine-Resistant, Ambush-Protected (MRAP) vehicles procurement program in 2007, worth more than US\$ XX billion. Purchases of MRAPs are expected to decline in the US, Canada, and other nations involved in NATO led peace keeping missions due to the scheduled withdrawal of forces from Iraq and Afghanistan. However, it is expected that future expenditure on C-IED vehicles will mostly be directed towards upgrades to the existing armor strength and maintenance.

Countries in the Asia Pacific, Middle East, Africa, and Latin America regions are expected to register a positive growth trend in counter IED vehicles owing to their armored vehicle modernization and procurement plans. Brazil has recently undertaken the US\$XX billion VBTP-MR Guarani vehicle procurement program to obtain 2044 armored vehicles, scheduled to continue till 2030. Similarly, India is expected to increase its spending on counter IED vehicles due to its ongoing border conflict with Pakistan and increasing terrorist activities.

Although the expenditure on counter IED vehicles portrays a declining trend in the US, the country still leads spending in this sector during the forecast period. The UK and Italy are also expected to spend substantial sums on this segment throughout the forecast period. The market for counter IED vehicles is anticipated to be US\$XX billion in 2012, and is expected to reach US\$XX billion in 2022. The cumulative market for counter IED vehicles is valued at US\$XX billion for the forecast period.

The table below gives a brief overview of the global counter IED market:

<b>Table 2: Global Counter IED Market Overview</b>				
<b>Particulars</b>	<b>Market in 2012</b>	<b>Market in 2022</b>	<b>Total Market (2012–2022)</b>	<b>Annualized growth/decline (2012–2022)</b>
Counter IED vehicles	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Electronic countermeasure	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Detection systems	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Counter IED training	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Unmanned systems	US\$XX billion	US\$XX billion	US\$XX billion	XX%
<b>Total Counter IED Market</b>	<b>US\$XX billion</b>	<b>US\$XX billion</b>	<b>US\$XX billion</b>	<b>XX%</b>

Source: SDI analysis © SDI