

2012-2020

# ***Non-Lethal Weapons: Technologies & Global Market.***

***Competitive Landscape, Vendors, Products & Prices***



## Table of Contents

<b>1</b>	<b>Scope and Methodology .....</b>	<b>9</b>
1.1	Introduction .....	9
1.2	Scope.....	11
1.3	Research Methods.....	11
1.4	Assumptions .....	12
<b>2</b>	<b>Non-lethal Products .....</b>	<b>13</b>
2.1	Blunt Impact NLW-Kinetic Munitions.....	13
2.3	Diverse Non-Lethal Weapons .....	14
2.3.1	Background - Weapons that Halt or Disperse People .....	14
2.3.2	Electro-shock Stun Weapons (Taser).....	16
2.3.3	Stun Grenades .....	17
2.3.4	Laser Scatters and Dazzlers.....	17
2.3.5	DF/HF Lasers .....	17
2.3.6	Foams .....	18
2.3.7	Water Cannons.....	18
2.3.8	High Intensity Directed Acoustics (HIDA) .....	19
2.3.9	Tear Gas and Pepper Spray.....	19
2.3.10	Stink Bombs .....	21
2.3.11	Calmatives.....	21
2.3.12	Acoustic Hailing Devices .....	21
2.3.13	Optical Distracters .....	23
2.3.14	Active Denial System.....	24
2.3.15	Nets .....	24
2.3.16	Chatsatsit (Gravel Thrower).....	25
2.3.17	MAUL (Multi-shot Accessory Under-barrel Launcher) .....	25
2.3.18	Firestorm Grenade Launcher.....	25
2.4	Anti-Vehicle Non-Lethal Weapons .....	26
2.4.1	Caltrops .....	26
2.4.2	Stinger Spike Strips .....	26
2.4.3	Nets .....	26
2.4.4	Barriers.....	26
2.4.5	Slippery Foams.....	26
<b>3</b>	<b>Leading NLW Vendors .....</b>	<b>27</b>
3.1	Aardvark Tactical, Inc. .....	27
3.2	Able 2 Products Company .....	28
3.3	Alliant Techsystems .....	28
3.4	AMTEC .....	29
3.5	BAE Systems plc .....	30
3.6	Bazalt.....	31
3.7	Boeing.....	31
3.8	Centech .....	33
3.9	Chemring Defense .....	34

3.10	Combined Tactical Systems, Inc.....	34
3.11	Defense Technology Corp.....	35
3.12	Fiocchi .....	35
3.13	FN Herstal.....	36
3.14	Goodrich Corporation.....	37
3.15	Heckler and Koch.....	38
3.16	General Dynamics Corporation.....	39
3.17	ISPRA .....	40
3.18	JAYCOR .....	41
3.19	Kratos Defense & Security Solutions, Inc. ....	42
3.20	L-3 Communications .....	44
3.21	Lamperd Less Lethal Inc.....	45
3.22	LE Systems, Inc. ....	46
3.23	LRAD Corporation.....	47
3.24	Mace Security International, Inc.....	48
3.25	Megaray.....	49
3.26	Metal Storm Limited .....	50
3.27	Mikor .....	51
3.28	MK Ballistic Systems.....	52
3.29	Mossberg .....	52
3.30	Non-lethal Technologies, Inc. ....	53
3.31	Penn Arms, Inc. ....	53
3.32	PepperBall Technologies .....	54
3.33	Policske Strojirny .....	55
3.34	PW Defense.....	55
3.35	Raytheon .....	56
3.36	Remington Arms Company.....	57
3.37	Royal Ordnance .....	58
3.38	SEA Technology .....	58
3.39	Security Devices International Inc. ....	59
3.40	SNPE .....	60
3.41	Taser International.....	61
3.42	TFM .....	62
3.43	Universal Propulsion.....	62
3.44	Verney Carron.....	63
3.45	ZARC International, Inc. ....	63
<b>4</b>	<b>F.Y.2011 Less-lethal Weapons Contracts.....</b>	<b>64</b>
<b>5</b>	<b>Less-lethal Products: Prices &amp; Description .....</b>	<b>68</b>
5.1	Expandable Baton.....	68
5.2	Wooden Baton .....	68
5.3	Portable Bullhorn .....	69
5.4	Ground-Mounted Bullhorn.....	69
5.5	Individual Voice Amplification System (M7) .....	69
5.6	High-Intensity Light .....	70
5.7	Individual High-Intensity Light .....	70

5.8	Individual High-Intensity Light Accessory Kit .....	70
5.9	Disposable Restraint System .....	71
5.10	Individual Riot Control Agent Dispenser .....	71
5.11	Inert Individual Riot Control Agent Dispenser .....	72
5.12	Midsized Riot Control Agent Dispensers.....	72
5.13	High Volume Output High-Capacity Oleoresin Capsicum (OC) Dispenser .....	73
5.14	Squad Riot Control Agent Dispenser .....	73
5.15	Refill Unit Riot Control Agent (Live) .....	74
5.16	12-Gauge Shotgun With High-Intensity Light Kit.....	74
5.17	12-Gauge Gunstock Carrier (6 Round) .....	74
5.18	12-Gauge Launching Cup.....	75
5.19	Caltrops .....	75
5.20	Roadside Spike Strip .....	75
5.21	Riot Training Suit With Accessories .....	76
5.22	Riot Training Bag .....	76
5.23	12-Gauge Dummy Round .....	76
5.24	12-Gauge Point Round .....	77
5.25	12-Gauge Area Round.....	77
5.26	12-Gauge Diversionary/Flash-Bang Round .....	77
5.27	12-Gauge Launching Cup Cartridge .....	78
5.28	12-Gauge Beanbag Round .....	78
5.29	40 mm Area Round.....	78
5.30	40 mm Foam Rubber Baton Round .....	79
5.31	40 mm Sponge Point Grenade .....	79
5.32	5.56 Point Round .....	79
5.33	5.56 Area Round.....	80
5.34	Diversionary/Flash-Bang Stun Hand Grenade .....	80
5.35	Rubber Ball Hand Grenade.....	80
5.36	Inert Rubber Ball Hand Grenade.....	81
5.37	Light Vehicle Obscurant Smoke System (LVOSS).....	81
5.38	66 mm LVOSS Canister (Rubber Ball).....	81
5.39	66 mm LVOSS Canister (Diversionary/Flash-Bang) .....	82
5.40	66 mm Riot Control Grenade (L96A1) .....	82
5.41	66 mm Riot Control Training Grenade (L97A1) .....	82
5.42	Modular Crowd Control Munition.....	83
5.43	Portable Vehicle-Arresting Barrier (PVAB).....	83
5.44	Dissuader Laser Illuminator .....	83
5.45	12-Gauge Rubber-Fin Stabilized Projectile Round .....	84
5.46	12-Gauge Rubber Stingball Round .....	84
5.47	Running Gear Entanglement System.....	84
5.48	Copper Solid Sabot Slugs.....	85
5.49	12-Gauge Peacekeeper .....	85
5.50	ARWEN® 37 mm Weapon System.....	85
5.51	SAGE SL-6® 37 mm Weapon System.....	86
5.52	SAGE SL-1® 37 mm Weapon System.....	86

5.53	M-26 Advanced Taser.....	86
5.54	40 mm Rifled Barrel Launcher With Mounted Holographic Site .....	87
5.55	Pyrotechnic Grenade No. 2, CS.....	87
5.56	Pyrotechnic Grenade No. 3, CS.....	87
5.57	Pyrotechnic Grenade, Triple Charger .....	88
5.58	37 mm Scat Shell, CS.....	88
5.59	37 mm Impact Munition, Stinger .....	88
5.60	37 mm Impact Munition (Kinetic), Foam Baton .....	89
5.61	12-Gauge Impact Munition, Beanbag, Super Sock™ .....	89
5.62	Aerosol Disburser MK-46™, OC .....	89
5.63	Aerosol Disburser, ProtectoJet 5™, OC/CS .....	90
5.64	Aerosol Disburser, OC/CS, MK-9.....	90
5.65	MK-4 Handheld OC Dispenser.....	91
5.66	T-16 OC Nonpyrotechnic Expulsion Grenade .....	91
5.67	No. 15 OC/CS Rubber Ball Munition.....	91
5.68	PepperBall™ .....	92
5.69	No. 15 Stinger™ Grenade .....	92
5.70	No. 20 37 mm Fired Foam Batons.....	92
5.71	37 mm Beanbag Round .....	92
5.72	Wooden Riot Baton.....	93
5.73	Hot PAVA Powder Projectiles PC3-R375-8 .....	93
5.74	Hot PAVA Powder Projectiles PC3-R375-1 .....	93
5.75	Hot PAVA Powder Projectiles PC3-R375-2 .....	93
5.76	Hot PAVA Powder Projectiles PC3-R375-4 .....	93
5.77	Paintballs Clear 8000/CASE .43C 2000CL43 .....	94
5.78	Other Products.....	94
<b>6</b>	<b>US DOD NLW Vendors-Products .....</b>	<b>95</b>
<b>7</b>	<b>Review of Less-lethal Weapons .....</b>	<b>98</b>
7.1	Non-Lethal Weapons Classification .....	98
7.2	Lethal Weapons Having Non-lethal Capability .....	99
7.3	Non-Lethal and Lethal Effects of NLW .....	100
7.4	Medical Effects of NLW.....	101
7.5	Non-Lethal Weapons Characteristics.....	102
7.5.1	NLW Effectiveness Vs. Lethality, Tradeoff.....	102
7.5.2	NLW Range consideration.....	102
7.5.3	Repeatable Effects .....	103
7.5.4	NLW Selectivity .....	103
7.5.5	Standoff NLW .....	104
7.6	Non-Lethal Weapons Usage .....	105
7.6.1	NLW: Pros and Cons .....	105
7.6.1.1	Strategic Benefits of NLW .....	105
7.6.1.2	Operational Benefits.....	106
7.6.1.3	Tactical Benefits.....	106
7.6.1.4	Advantages of Non-Lethal Weapons Against Insurgents .....	106

7.6.1.5	NLW: Legal Considerations .....	108
7.6.1.6	NLWs May Expand the Spectrum for Force Employment .....	109
7.6.1.7	Improper Use of NLW .....	109
7.6.1.8	Other constraints.....	109
7.6.1.9	Drawbacks of NLW Use Against Terrorists .....	110
7.6.2	NLW Strategies .....	111
7.6.2.1	Law Enforcement .....	111
7.6.2.2	Low Intensity Conflicts .....	111
7.6.2.3	Peacekeeping Operations.....	112
7.6.2.4	Emerging Conflicts .....	112
7.6.2.5	Use of NLW in Major Violent Conflicts .....	114
7.6.2.6	Battlefield Application of NLW .....	116
7.6.3	Operational Scenarios .....	118
7.6.3.1	Rescue Operations at a Critical Site in Urban Terrain.....	118
7.6.3.2	Threat of WMD in Urban Terrain.....	118
7.6.3.3	Protection of Key Installations.....	119
7.6.3.4	Crowd Control at a Food Aid Distribution Point.....	119
7.6.3.5	Protection and Evacuation of a Minority.....	119
7.6.3.6	Asymmetric Threat.....	119
<b>8</b>	<b>Abbreviations.....</b>	<b>120</b>

## List of Tables

Table 1 - Comparative Effects of Non-Lethal Kinetic Munitions .....	13
Table 2 - Main Chemical Irritant Riot Control Gases.....	20
Table 3 - DOD Less lethal Weapons, Vendors-Products .....	95
Table 4 - Lethal Weapons Having Non-lethal Capability .....	99
Table 5 - Advantages of Non-Lethal Weapons Against Insurgents.....	107
Table 6 - Drawbacks of Non-Lethal Weapons Against Terrorists .....	110

## List of Figures

Figure 1 - Clinical Effects of NLW .....	9
Figure 2 - Direct Energy Lethal and Non-Lethal Effects .....	100
Figure 3 - Lethal and Non-Lethal Effects Spectrum .....	100
Figure 4 - Spectrum of Medical Effects for Less-lethal Weapons .....	101
Figure 5 - Medical Effects of NLW .....	101