

A background image showing several police officers in tactical gear, including helmets and vests. One officer's vest has a 'POLICE' patch, and another has an 'NCA National Crime Agency' patch. A yellow hexagon is positioned at the top center of the image.

UK SECURITY & RESILIENCE SECTOR

OUTLOOK
2026



Securing
UK advantage

The UK Security & Resilience Sector

serves as the silent guardian of our national security, enables growth and delivers innovation.

The threat landscape is growing more complex, with physical, cyber and hybrid attacks targeting critical infrastructure and supply chains. As Government strategies emphasise a whole-of-society approach to security and resilience, industry is responding by delivering capabilities that strengthen the UK's deterrence, mitigation and crisis preparedness.

In 2025, security and resilience contributed

£14.5bn

**IN VALUE ADD TO
THE UK ECONOMY**

150%

**GROWTH BETWEEN
2015 AND 2025**

The UK security and resilience sector underpins three core priorities:

**Protecting Critical
National Infrastructure**

**Strengthening Homeland
Security and Policing**

**Bolstering Home Defence
and Economic Security**

For industry, rising threats and global competition bring uncertainty but also the opportunity to stand out and deliver the required advanced innovation that is now demanded.

In 2025, the economic footprint of the UK security and resilience sector included:



149.5k
EMPLOYEES

70%
GROWTH
OVER 10 YEARS



£27.6bn
TURNOVER

168%
GROWTH
OVER 10 YEARS



£13.6bn
IN EXPORTS

240%
GROWTH
OVER 10 YEARS



£97.1k
OUTPUT
PER WORKER
(PRODUCTIVITY)

46%
GROWTH
OVER 10 YEARS

All 2025 data points are estimates
by Oxford Economics and ADS.

Outlook for the UK Security & Resilience Sector

Building Resilience Across the UK's Critical Systems

Daily life is dependent upon a set of critical systems that can only be ensured through a whole-of-society approach to resilience. Cyber security underpins the integrity of government functions and essential services, the flow of information, and the functioning of the economy.

This challenge is particularly acute for Critical National Infrastructure (CNI), most of which is privately owned or operated. As the Government advances its cyber and resilience strategies, public-private partnerships are essential to address emerging threats, meet evolving requirements, and improve long-term capability planning.

KEY INDUSTRY IMPLICATIONS

Updated cyber strategies and legislation introduce increasingly high expectations for suppliers.

Growing interdependencies across digital and physical systems require industry to help CNI embed resilience into system design, day-to-day operations, and incident response.

Industry must be at the centre of delivering stress-testing, expertise and support for national preparedness exercises.

Leveraging Technology for Homeland Security and Policing

The UK's approach to homeland security is evolving. At the same time, the Government is pushing forward major reforms for policing and law enforcement. In a context where organised criminality converges with state-linked hybrid threats, this transformation is reshaping frontline policing capabilities.

As the Government embeds technology across this reform agenda, from digital ID to advanced biometrics, the UK's security and resilience sector is well placed to translate these ambitions into trusted solutions across both digital and physical domains.

KEY INDUSTRY IMPLICATIONS

The blurring of state-based threats and organised criminality demands a more intelligence-led, adaptive response.

The centralisation of national policing functions and procurement creates clearer pathways for the safe uptake of advanced security technologies.

The growing use of technologies such as facial recognition, biometrics, and the creation of a digital ID system will require industry to keep pace with evolving regulatory and compliance frameworks.

 **Businesses that address the whole risk picture and innovate at pace will define the UK's next generation of security and resilience capabilities.**

Strengthening the UK's Home Defence and Economic Security

As hybrid threats from hostile state actors intensify, industry plays an essential role in strengthening the UK's home defence posture. It bridges defence and security supply chains, provides the capabilities on which national preparedness depends, and increases supply chain resilience and transparency to bolster economic security.

Deepening cooperation with international partners further supports the resilience of the security industrial base by enhancing access to emerging capabilities and interoperability and showcasing UK expertise and innovation.

KEY INDUSTRY IMPLICATIONS

The shift toward a home defence model drives the need to reduce strategic dependencies and increase sovereign industrial capability.

Economic security pressures are reshaping demand signals and transparency requirements.

International cooperation continues to build industrial resilience and UK influence.

What Next for Industry?

Businesses operating in the UK security and resilience sector must be prepared for:

EVOLVING COMPLIANCE REQUIREMENTS

New security strategies and legislation introduce stricter requirements for suppliers and closer links with operators.

COMPLEX AND HYBRID THREATS

The blurring of threat actors and persistence of non-malicious risks call for agile, adaptive solutions.

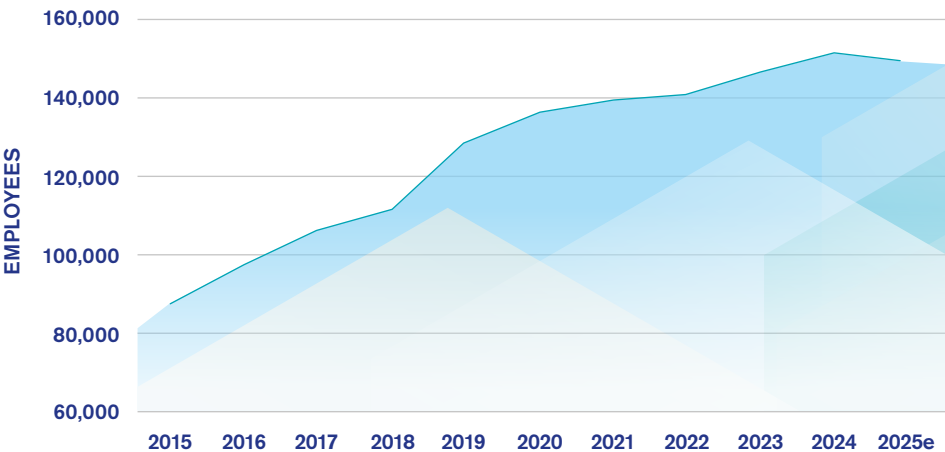
ECONOMIC SECURITY

Growing scrutiny of supply chain resilience and transparency is driving the need to reduce strategic dependencies and reinforce the UK's industrial capability.



People Powered Growth

A growing force: Security and resilience delivering continued employment growth



149,500
PEOPLE DIRECTLY
EMPLOYED IN THE
SECTOR IN 2025

70%
GROWTH
OVER 10 YEARS

Average annual salary

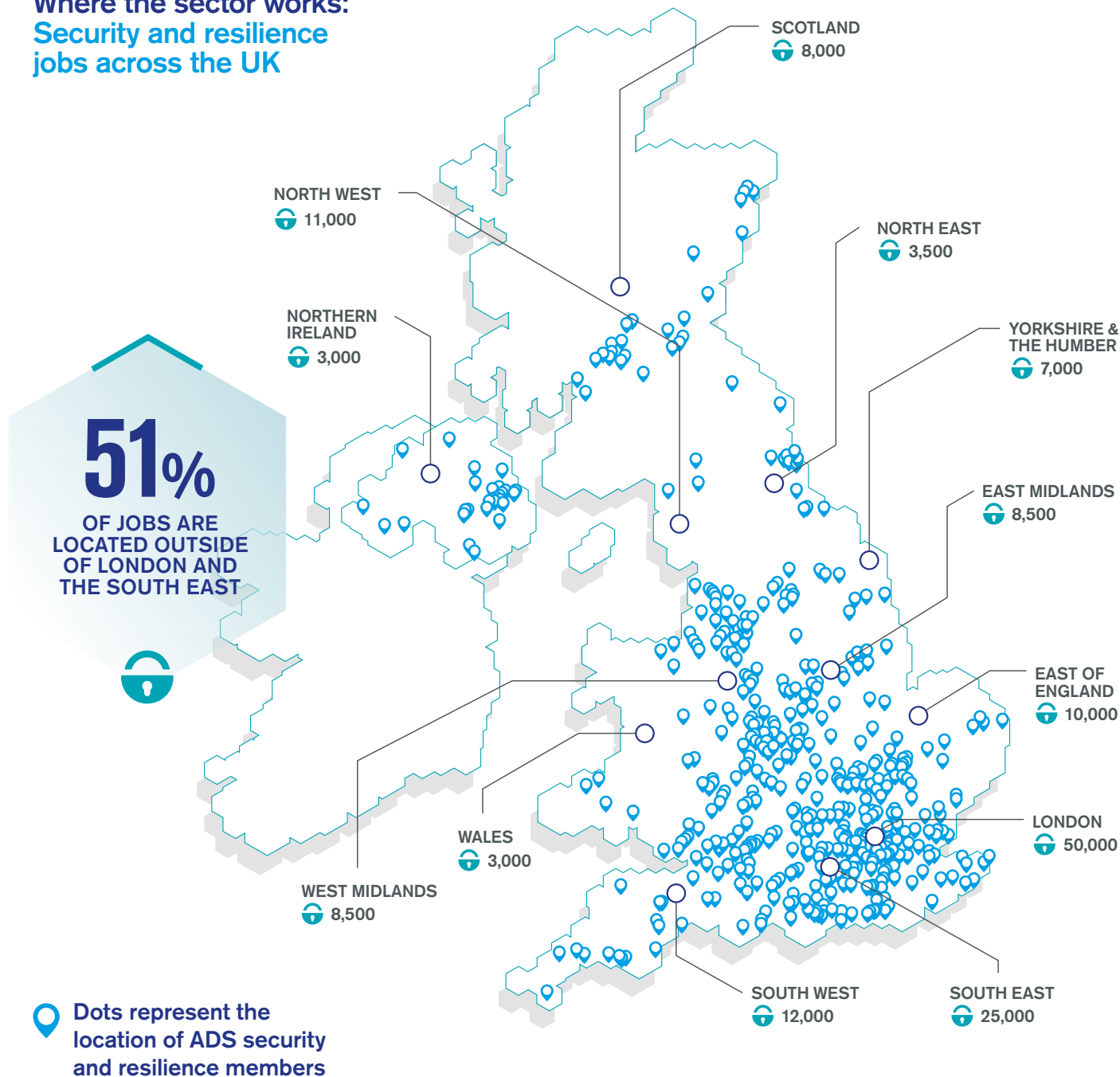
2015 **£34.5k** | 2025 **£48.9k** | A **42%** INCREASE

25%

HIGHER THAN
UK ECONOMY
AVERAGE

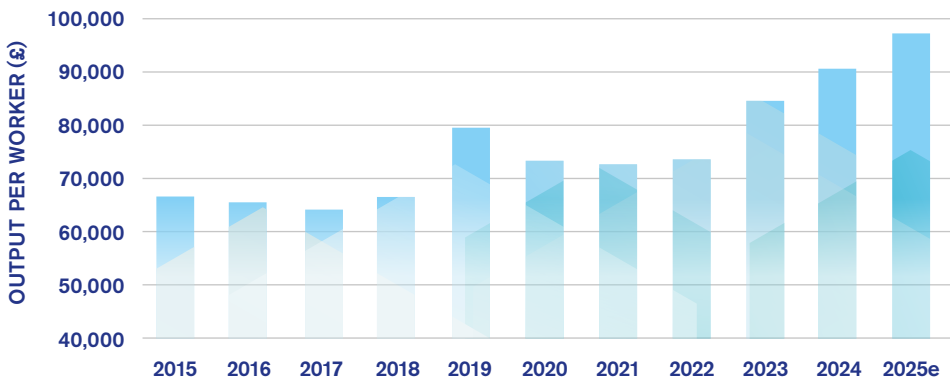


Where the sector works: Security and resilience jobs across the UK



Value proposition & value creation

Rising Productivity: Security and resilience growth momentum



ANNUAL
OUTPUT
PER
WORKER

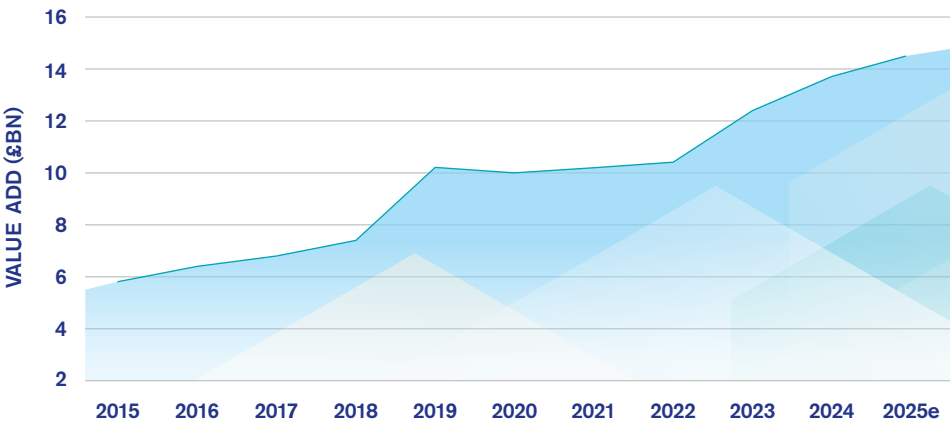
£97.1k

SECTOR
PRODUCTIVITY
HAS GROWN

46%

OVER 10 YEARS

Sector performance: Generating value to the UK economy



£14.5bn

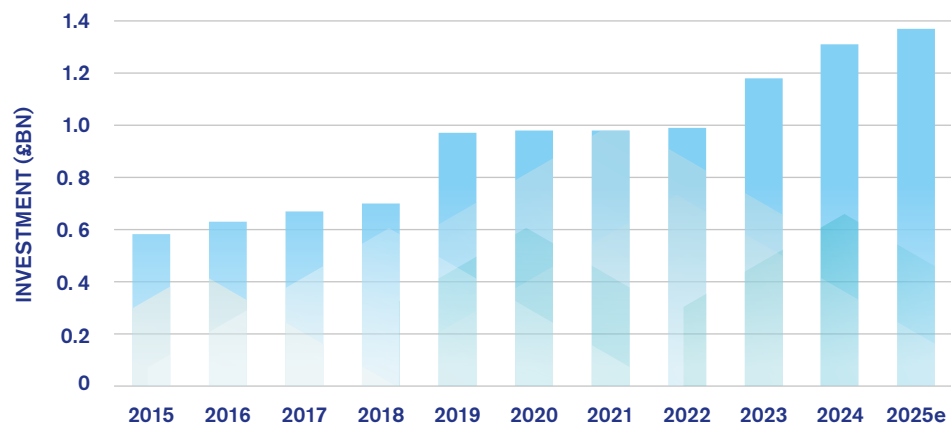
VALUE ADD IN 2025

GROWTH OF

150%

OVER 10 YEARS

R&D momentum: Accelerating innovation



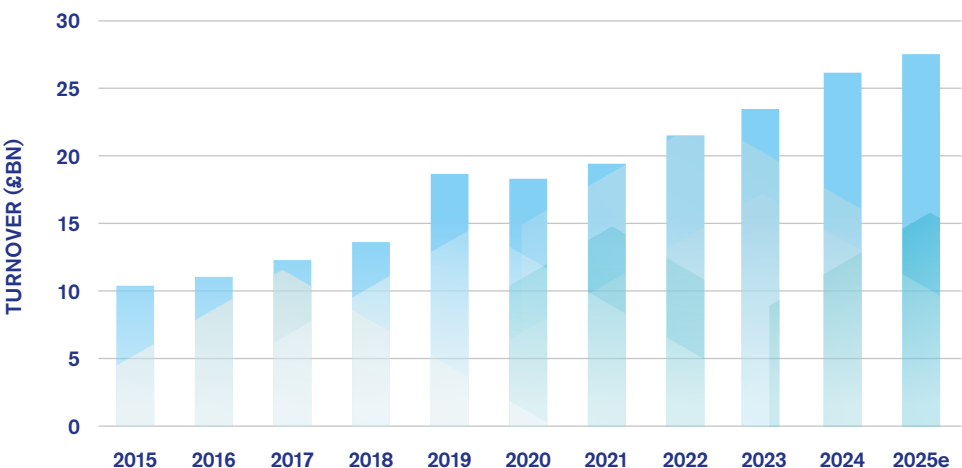
£1.4bn

SPENT ON R&D
BY SECURITY
AND RESILIENCE
SECTOR IN 2025



Resilience that scales

Strong and secure: Sector turnover accelerates



£27.6bn

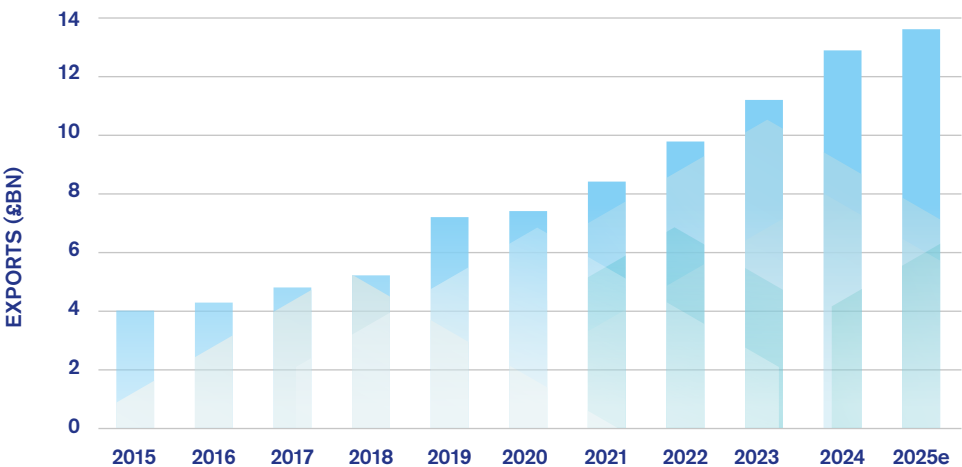
TURNOVER IN 2025

GROWTH OF

168%

OVER 10 YEARS

On the rise: Exports delivering sector growth



EXPORTS
HAVE GROWN

240%

OVER 10 YEARS

THE VALUE
OF EXPORTS
ACCOUNTS FOR

49%

OF SECTOR REVENUE

Digital capabilities lead exports in 2025

71%
DIGITAL

29%
PHYSICAL

Export splits





ADS is the trade association for the UK's aerospace, defence, security, and space industries, representing more than 1,800 members. We work with those sectors to secure the UK's advantage, enhance our international positioning as a go-to destination for innovation, and deliver on our sustainable leadership goals.

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Sources and methodologies

ADS Security Outlook 2026 uses data estimates for 2025 data compiled by Oxford Economics in 2026, based on publications from the Department for Business and Trade and the Ministry of Defence, using Westlands Advisory insights as well as ADS own sources.

Images courtesy of Excelebrate, Flare Bright, National Crime Agency, Smiths Detection.