

Homeland Security and Emergency Management Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 84 pages | Mordor Intelligence

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Report description:

The homeland security and emergency management market is anticipated to witness a CAGR of about 6% during the forecast period (2023 - 2028)

Due to the COVID-19 pandemic, the number of inbound travelers to all the countries in the world dropped drastically, which has reduced the demand for new customs and border protection equipment. On the other hand, the growth in riots, insurgent activities, and natural disasters in the last two years has led to increased demand from law enforcement and emergency management end-users.

The increasing procurements of enhanced security systems for intercepting the threat of terrorist attacks have been driving the homeland security and emergency management market, and this trend is anticipated to continue over the forecast period.

The increasing investments in the security of airports, seaports, and borders, as well as the development of custom and immigration services, are fuelling the growth of the market.

On the other hand, cyber threats are growing at a rapid pace with growing digitalization. This is anticipated to compel countries around the world to strengthen their cyber security to protect their IT infrastructure of government and private sector organizations.

Homeland Security & Emergency Management Market Trends

The Cybersecurity Segment to Experience the Highest Growth During the Forecast Period

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With the growth in the incidents of cyber attacks that pose a serious threat to governments, economies, businesses, and individuals, companies and governments are increasingly investing in improving their cybersecurity protocols and are formulated dedicated cyber strategies to face any kind of future cyber attacks. In January 2022, the UK government published its Government Cyber Security Strategy, which sets out its plans to increase the resilience of the public sector against cyber threats. The Strategy establishes a framework for transforming how cyber security is approached across the public sector with a strategic partnership with the cyber security industry. Similarly, several countries, including UAE, Italy, France, Ecuador, Brazil, and Singapore, among others, have launched their own cybersecurity strategies and are ramping up investments in this regard. In March 2022, the Indian government announced that it would spend INR 515 crore (USD 65 million) on cyber security in 2022-23, of which INR 215 crore (USD 27 million) would go to CERT-In, the nodal agency that deals with cyber security threats. This represents an increase of about 10 times in the country's cybersecurity spending compared to 2014-15. The growth in such investments is expected to drive the growth of the segment during the forecast period.

The North American Region is Leading the Market

The North American region currently has the highest share in the homeland security and emergency management market. This is majorly due to the investments in homeland security and public safety by the governments of the United States and Canada. The government of the United States has increased its budget allocation for the Department of Homeland Security (DHS). As of FY2022, the DHS was allocated a total of USD 97.3 Billion, of which USD 56.7 Billion was the net discretionary funding. Also, according to the US National Oceanic and Atmospheric Administration (NOAA), the country experiences total damages of more than USD 80 billion each year from hurricanes, wildfires, floods, and other disasters. To take appropriate measures in such disaster events, the country is investing in various first responders and agencies through the Disaster Relief Fund (DRF). In line with this, as of March 2022, in case of any emergency, a total of USD 3 billion was diverted to the disaster relief funding to cover any recovery efforts by multiple states and local governments. Similarly, Canada has been increasing its investments in national security and public safety over the past few years. For instance, in May 2022, Canada announced that the government is working alongside NGOs by funding them to build capacity and respond to emergencies and keep communities safe. It has also announced total funding of CAD 150 Million for supporting the Humanitarian Workforce (HWF) to respond to Large Scale Emergencies. As the country is susceptible to earthquakes, avalanches, tsunamis, hurricanes, and other natural hazards, such investments are anticipated to support the risk and damage, thereby supporting the growth of the market in this region during the forecast period.

Homeland Security & Emergency Management Market Competitor Analysis

The market of homeland security and emergency management is highly fragmented, with many suppliers who provide various types of equipment to various agencies and end-users. Some of the prominent players in the market are Lockheed Martin Corporation, Elbit Systems Ltd., Northrop Grumman Corporation, Raytheon Technologies Corporation, and Thales Group. The brand value of the companies helps them receive contracts or orders from the governments or national security agencies, due to which the entry of new players into the market is difficult. Also, the development of new equipment and technology for better detection of hostile entities at borders, airports, maritime patrol, or cyber networks is anticipated help the companies gain new customers and expand their geographic presence. The integration of technologies like Big Data Analytics to provide security solutions, predictive analytics for security, crime prevention, and privacy protection, and Artificial Intelligence (AI) to prevent cyber attacks is expected to provide growth opportunities for the players in the years to come.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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