

North America Electronic Toll Collection System Market Size and Forecasts (2020 - 2030), Regional Share, Trends, and Growth Opportunity Analysis Report Coverage: By Offering (Hardware Equipment and Service), Technology (ANPR, GNSS, DSRC, and Others), and Application (Highways and Urban Zones)

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Report description:

The North America electronic toll collection system market size was valued at US\$ 1.95 billion in 2022 and is expected to reach US\$ 5.21 billion by 2030; it is estimated to record a CAGR of 13.1% from 2022 to 2030.

The North America electronic toll collection system market is segmented into the US, Canada, and Mexico. The US is estimated to hold the largest share in the North America electronic toll collection system market share during the forecast period. Consistent collaborative efforts of interstate agencies, as well as support in the past decade, resulted in a significant network of ETC-based toll centers across the country. According to Assemblyman, in February 2019, E-ZPass-the country's leading ETC-based system-had over 35 million signal transponders that managed 21 million accounts for electronic toll collection across 17 states. Further, with the vision of becoming a preeminent toll collection program, the system is the largest interoperable network of ETC systems in the world. It generates a revenue of ~US\$ 9.0 billion for the partnered agencies. Factors such as scalability, registration of new vehicles, and maintenance of the existing ETC systems are expected to be the major drivers for the US electronic toll collection market during the forecast period. Also, the use of analytics for reporting and gathering actionable insights into traffic patterns for efficient congestion management and traffic monitoring is expected to provide scope for innovative services that could be integrated through the electronic toll collection system could provide lucrative business opportunities for the North America electronic toll collection system market players. Moreover, increasing smart city initiative gaining widespread adoption across the US. For instance, in 2021, Pikepass of Oklahoma Turnpike Authority became the first electronic toll collection system in the US. The system can electronically debit the accounts of the registered car owners without the need to stop, resulting in low congestion near toll plazas.

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Based on technology, the North America electronic toll collection system market is broadly segmented into Automate Number Plate Recognition (ANPR), Dedicated Short-Range Communication (DSRC), Global Navigational Satellite System (GNSS), and others (mobile, smart cards, and video analytics). The GNSS segment is growing with the highest CAGR in the North America electronic toll collection system market. It requires high technical expertise to design an ETC system utilizing the global navigational satellite system (GNSS or GPS) technology. The technology is relatively new and is being explored for designing an ETC system with superior interoperability across wide geographical regions. Moreover, the technology is primarily suitable for toll collection purposes and not suitable for enforcement or identifying violators. However, the growing awareness regarding data privacy and protection is likely to have a negative influence on the market growth as the solution might expose the data to toll operators or unauthorized individuals. However, the availability of sharing the cost of technology owing to the large-scale popularity of GPS-based applications, services and products could provide a promising market for GNSS-based ETC system with wider geographical coverage. The technology also eliminates the infrastructure requirement at toll gateways or plazas for revenue collection resulting in an efficient and robust interoperable ETC system. Thus, the North America electronic toll collection system market is expected to provide profitable opportunities for the market players. Furthermore, the increasing adoption of GPS and GNSS toll collection and tracking solutions in various regions is driving the North America electronic toll collection system market.

Conduent Inc, Kapsch TrafficCom AG, Thales SA, Toshiba Infrastructure Systems and Solutions Corp, TransCore LP, Magnetic Autocontrol GmbH, The Revenue Markets Inc, Sociedad Iberica de Construcciones Electricas SA, P Square Solutions LLC, Verra Mobility Corp, and Mitsubishi Heavy Industries Ltd are among the key North America Electronic Toll Collection System Market players that are profiled in this market study.

The overall North America Electronic Toll Collection System Market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the North America Electronic Toll Collection System Market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the North America Electronic Toll Collection System Market.

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