

## **APAC Airport Passenger Screening Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 70 pages | Mordor Intelligence

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### **Report description:**

The APAC Airport Passenger Screening Systems Market size is estimated at USD 0.69 billion in 2024, and is expected to reach USD 1.07 billion by 2029, growing at a CAGR of 9.29% during the forecast period (2024-2029).

#### Key Highlights

- The rising number of terrorist and hostile activities around the world are forcing countries to increase their customs and border security. In this regard, airport security has become a matter of concern, thereby, acting as a driver for airport passenger screening systems.
- The number of travelers opting for air travel is increasing at a rapid pace, making it difficult for airports to handle a vast inflow of passengers. Also, an increasing number of passengers means that the security measures that need to be taken should also increase, which demands more investments in passenger screening systems.
- Technological developments such as powerful body scanners, Artificial Intelligence and Machine Learning, Blockchain technology, facial and biometric recognition is driving the market growth for passenger screening systems in Asia-Pacific countries such as India and China.
- The outbreak of COVID 19 pandemic has deeply affected the aviation industry in Asia-Pacific region. The growing demand to place thermal imaging camera systems at airports to check the temperature of visitors is expected to significantly fuel the growth of thermal screening systems during the forecast period.

### **APAC Airport Passenger Screening Systems Market Trends**

Advanced Imaging Technology Segment is Expected to Lead the Market During Forecast Period

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- Advanced Imaging Technology (AIT) segment is expected to lead the market during the forecast period. AIT uses automated target recognition software that eliminates passenger-specific images and instead auto-detects potential threats by indicating their location on a generic outline of a person. The commercial aviation industry has witnessed a sharp recovery, and air passenger traffic is expected to grow at a rapid pace during the forecast period.
- The Asia-Pacific region ranked third globally in worldwide passenger traffic in 2022. The rise in passenger traffic in the region is contributing to the market's growth. Furthermore, increasing new airport construction projects and rising airport modernization programs create demand for advanced passenger screening systems, driving the market growth during the forecast period.
- These latest variants of body scanners are second-generation AITs. The AIT unit is based on millimeter wave technology, which uses electromagnetic waves to perform a single scan of the passenger. AIT body scanners are the most widely used device for passenger screening at airports worldwide. It is an advanced variant of full-body detectors and eliminates the drawbacks related to privacy issues. The advantages of AIT over other security systems will increase its demand and, thereby, will drive the market during the forecast period.

#### China to Exhibit Significant Growth During the Forecast Period

- China's airport passenger screening systems have witnessed significant growth in recent years. Growth in terms of air passenger traffic will be the major factor behind the market growth in the near future. According to CEIC data, domestic air passenger traffic for January 2023 in China was reported at 39.332 million pax. This records a decrease from the previous number of 249.849 million pax for Dec 2022. In the current scenario, airports and airlines based in China are prioritizing technology to improve efficiency and passenger security.
- Airlines and airports in China are leading the way globally in automating the passenger journey, with 100% of airlines saying they are investing in upgrading their passenger security systems. In particular, the industry is focused on introducing biometrics at more touchpoints. Moreover, according to Societe Internationale de Telecommunications Aeronautiques' (SITA) 2021 Air Transport IT Insights, Chinese airlines, and airports are continuing their push towards digitalization to support operational efficiencies, thereby streamlining the passenger journey. In the current scenario, various airport expansion projects are witnessed in China.
- According to the Civil Aviation Administration of China (CAAC), in 2021, China's air traffic passenger, cargo, and mail transportation volume increased year-on-year by 7.3%, 5.5%, and 8.2%, respectively. According to the same data, China boasted 241 certified transport airports at the end of 2020. During that year, 114 airport projects were either started or continued.
- Furthermore, the total number of airports at the end of 2020 was 58 more than China had just eight years earlier, in 2012. That is equivalent to around seven new airports being opened each year. According to governmental plans released in February 2021, China aims to have 400 civilian airports by the end of 2035, or an increase of 150 compared with the number at the end of 2020, meaning that China will average around 10 new airports annually by 2035.
- In 2021, the Chengdu Tianfu Airport and Qingdao Jiaodong International Airport became operational, bringing the total number of certified airports nationwide to 248. By 2025, China is expected to have more than 270 civilian airports. According to CAAC, China's 32 large and busy airports are suffering from capacity overload, and 40 of China's 50 largest airports must be renovated or expanded. Moreover, China's 14th five-year plan includes 140 airport projects involving greenfield construction, relocation, renovation, and expansion.
- The increase in the number of airports in China till 2035, according to CAAC data, will lead to an increase in the procurement of commercial aircraft to support the growing passenger traffic at new airports as well as installations of new passenger screening systems such as biometrics or iris scanning technology which will have a positive outlook on the market and will lead to the market growth of airport passenger screening systems in China during the forecast period.

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## APAC Airport Passenger Screening Systems Industry Overview

The market for airport passenger screening systems in the Asia-Pacific is fragmented with China being home to many local airport passenger screening technology manufacturers. However, the market is dominated by major global players such as Analogic Corporation, Smiths Group plc, Garret Electronics Inc., Leidos, Inc., OSI Systems Inc., Nuctech Company Limited, etc. The market is witnessing a lot of collaborations, tie-ups, and joint ventures between manufacturers, technological companies, and other facility providers to produce cutting-edge products to cater to the location-specific needs of customers owing to the rising trafficking of illicit goods, terrorism, stringent protocols, standards, etc.

### Additional Benefits:

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

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