

Automated Border Control - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Automated Border Control Market size is estimated at USD 2.03 billion in 2024, and is expected to reach USD 4.31 billion by 2029, growing at a CAGR of 16.20% during the forecast period (2024-2029).

Rising country threats and terrorist attacks have diverted the government's attempts in numerous regions toward improving the implementation of public-safety technology, which is expected to drive market growth over the coming years.

Key Highlights

- Over the past few years, a rapidly increasing demand for border crossing was witnessed, where the need to speed up the clearance process at the Border Crossing Points (BCP) has been significant. The Automated Border Control (ABC) gates, or the e-Gates, can verify the traveler's identities crossing the borders by exploiting their biometric traits without constant human intervention.
- A prominent element driving the expansion of the worldwide automated border control business is the increasing implementation of automation-based technologies in airports, land ports, and seaports due to increased security concerns. Furthermore, an automated border control system makes traveling people's lives easier. It also saves time and removes the possibility of human mistakes.
- Increasing global trade has boosted the number of corporate travelers worldwide. For instance, according to the Global Business Travel Association (GBTA), worldwide business travel expenditure is predicted to increase in 2022, with a complete recovery anticipated in 2024, bringing the year to a close on par with the pre-pandemic spending of USD 1.4 trillion in 2019. Thus, it is expected to increase the demand for border security technologies, which will contribute to market growth over the coming years.
- Strong government legislation that avoids COVID-19 has compelled port operators, airport management, and others to employ touch-free safety technologies. Furthermore, due to significant government backing and the need to limit the pandemic's

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transmission, certain airport officials aim to introduce border security protocols in the coming years, which is expected to create lucrative opportunities for market growth over the forecast period.

-Automated border control systems need large expenditures to provide the necessary infrastructure. These technologies are created by combining different equipment and technology parts, including passport readers, biometric identity devices like facial and retina imagers, applications for documentation verification with recorded databases, and bespoke check applications. Each piece of hardware and technology is quite costly on its own. Hence the combined system has a high initial investment.

Automated Border Control Market Trends

Airport Applications are Expected to Witness a Rapid Growth

- The aviation industry is anticipated to hold a significant market share. It will continue its position during the forecast period, primarily due to the substantial rise in airports and the exponential increase in air passenger traffic. The increasing threat of terrorist attacks and the security standards set by the international authorities, including IATA, ICAO, and ACI, are among the two most influential drivers sustaining the market studied.

- Airlines can handle a considerable number of people at once due to the growth in aircraft transportation and passenger numbers. The increase in air travel is brought on by factors including an increase in the number of people traveling abroad for higher education and career opportunities, a decrease in air travel costs, a change in how people move about, and an increase in the wealth of HNWIs (high-net-worth individuals).

- For instance, in March 2022, The International Air Transport Association (IATA) anticipates that there will be 4.0 billion travelers worldwide in 2024. Furthermore, International passenger numbers in 2021 were 27% of 2019. This figure is expected to rise to 69% by 2022, 82% by 2023, 92% by 2024, and 101% by 2025.

- In the United States, an Automated Passport Control (APC) program was introduced to expedite the Canadians' entry process, US passengers, and the passengers eligible for Visa Waiver Program, by providing an automated process through CBP's Primary Inspection area. Such initiatives by the government are estimated to drive the market studied.

- Longer check-in times generate overcrowding, causing travelers to spend significant time standing in lines. To prevent such bottlenecks, e-gate technologies are utilized. The need to transport people efficiently via airport checkpoints and the growth in security concerns necessitates the development of innovative technical solutions. For instance, In June 2022, the Bangladesh government opened 12 e-gates at Dhaka International Airport. Passengers possessing e-passports may now utilize e-gates at Hazrat Shahjalal International Airport to accomplish their immigration quickly. Under the "E-Passport and Automated Border Control Management Project," the government intends to install 50 e-gates at significant airports and land ports around the country.

Europe is Expected to Hold the Largest Market Share

- Across Europe, border agencies, governments, and industry decision-makers have faced a significant challenge: to majorly evolve and innovate their border management amid the increasing passenger traffic and changing government regulations.

- According to the Airports Council International Europe (ACI Europe), passenger counts at airports throughout the continent increased by 247% year on year in H1 2022, totaling 660 million passengers. The rise was primarily attributable to an increase in overseas traffic of 381.2%, while local traffic climbed by 88.5%. With the predicted number of international travelers, new technologies are being deployed or linked with current systems to improve border security.

- In July 2022, The U.K. government released its "New Plan for Immigration: Legal Migration and Border Control," which outlines initiatives the administration will undertake over the next five years to enhance the end-to-end user experience of persons

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passing the U.K. border. The policy strongly emphasizes digitalization and automating immigration and border systems, increasing security and establishing the U.K. as a global leader in legal migration.

- According to FRONTEX, in October 2022, roughly 228,240 irregular entrances were identified at the European Union's outer borders during the first nine months of this year. This reflects a 70% increase over the same timeframe last year and is the biggest total for the initial three-quarters of the period since 2016. Thus, increasing irregular entrances across the border will increase the demand for border security, contributing the market growth.

- Furthermore, increasing government funding in technology innovation for border security is expected to drive market growth. For instance, in May 2022, according to State Watch, the E.U. invested GBP 341 million (~USD 413.4 million) in studies into artificial intelligence innovations for immigration, asylum, and border control objectives since 2007.

Automated Border Control Industry Overview

The automated border control market is moderately consolidated, with a few major companies. The companies continuously invest in strategic partnerships and product developments to gain more market share. Some of the major players include Atos SE, Cominfosec Inc., Veridos GmbH, HID Global Corporation, and Cognitec Systems GmbH.

In August 2022, Samarkand International Airport unveiled the Republic of Uzbekistan's first E-gate border protection system, which employs biometric technology to enable a smooth passenger trip. The automatic border control technology is founded on biometric technologies. It enables automated identification of individuals and the rapid and safe border crossing with little participation of border control agents.

Also, in August 2022, The Immigration Department deployed Automated Passport Control (APC) kiosks to facilitate entrance for returning VI nationals with the British Virgin Islands or United Kingdom cards to the Territory. The APC machines will allow qualified tourists to scan their passports and complete admission questions. If the facial recognition authentication is successful, the system permits the tourists to enter the Territory.

- August 2022 - Toronto Pearson International Airport officially began using its innovative eGates for customs and passport reporting at Terminal 1. To reduce airport delays, the airport started testing the eGates system.

Additional Benefits:

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

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