

Automatic Identification System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Automatic Identification System Market size is estimated at USD 384.51 million in 2024, and is expected to reach USD 535.55 million by 2029, growing at a CAGR of 6.85% during the forecast period (2024-2029).

The spread of COVID-19 severely affected the market growth. Due to the closing of international borders to contain the virus spread, ports were closed with no trade deals, hindering market growth during the pandemic.

Key Highlights

- The International Maritime Organization's International Convention for the Safety of Life at Sea requires automatic identification systems to be fitted in international voyaging ships with 300 or more GT (Gross Tonnage) and passenger ships, regardless of size.
- In February 2021, the Southern Region Marine Department of Malaysia issued Port Circular No. 02/2021, informing the maritime community that it may require all vessels approved to operate to activate their Automatic Identification System (AIS) at times.
- Sea freight has witnessed significant growth across the world in recent years. Considerable investments are being made for the marine industry at a global level, which has led to an increased demand for AIS, especially for vessel tracking.
- The UK planned a Maritime Trade and Investment Five-Year Plan, focusing on five main areas - Green Maritime, Digital Technologies, Autonomous Vessels, Marine Science, Maritime Professional, and Business Services. Additionally, Myanmar announced the installation of AIS on its coastal and fishing vessels to ensure maritime security. To control AIS and exchange navigation information, AIS stations are expected to be established at 19 jetties, and the range of the AIS may stretch to 48-80 kilometres.
- AIS systems transmit radio signals in the maritime VHF band, and airwaves are inherently noisy. In ports and crowded areas, bandwidths often become congested due to competing signals, which interfere with each other. Additionally, satellites and ground-based receivers may only take in limited information simultaneously. Due to this congestion, any individual vessel may

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drop on and off the map. More satellites receiving AIS signals shall help enhance the coverage, but currently, they are of limited receiving capacity.

Automatic Identification System (AIS) Market Trends

Fleet Management is Expected to Hold Significant Share

- According to the United Nations Conference on Trade and Development's (UNCTAD) Review of Maritime Transport 2021 International, marine shipments declined by 3.8% to 10.65 billion metric tons. The world fleet comprised 99,800 ships of 100 gross metric tons or more in early 2021, equivalent to 2,134,639,907 DWT (deadweight tonnage) of capacity, and the global shipping fleet grew by 3% in the year leading up to January 1, 2021. With the growing number of ships, it has become difficult for shipping companies to manage and analyze these large fleets as the reporting requirement and emission standards continuously evolve.
- Ships can connect via the fleet management system, sharing crucial information and updates. The operators can plan the arrival and departure of ships in predetermined zones. This is critical for traveling through congested ports and pre-defined zones where they must schedule slots that are only available for a limited time. The shipping businesses must pay for these slots; they may have to pay even more if they do not arrive during the scheduled time.
- Companies such as Big Ocean Data are adding capabilities to their fleet management solutions, such as a 5-day weather forecast and risk-based routing capability. As the European Union (EU) plans the subsequent EU monitoring, reporting, and verification (MRV) rule to monitor emissions, fleet management solutions will play a critical role in the future for ships operating in the EU. The fleet management system may reduce the time and effort required to record speed, fuel consumption, pollutants, and work statistics.
- With the help of fleet management solutions, shipping companies can control their fleet in real-time, due to which ships can navigate around any unforeseen climate situation. The fleet managers can now trigger alarms with no lead times, so the crew on the ships can make timely decisions.

North America is Expected to Hold Significant Share

- The United States Coast Guard (USCG) has been a key driver in promoting AIS adoption and implementation in North America. The USCG has implemented the Nationwide Automatic Identification System (NAIS), a network of AIS receivers and transmitters along the US coastline and inland waterways. This program aims to enhance maritime situational awareness, improve navigation safety, and support maritime security efforts. The USCG's commitment to AIS implementation demonstrates North America's leadership in the market.
- The Canadian Coast Guard has also prioritized AIS adoption as part of its maritime safety and security initiatives. Canada has implemented the National AIS System, which covers major waterways, including the Great Lakes and the St. Lawrence Seaway. The system enables vessel tracking and collision avoidance and aids in search and rescue operations. The Canadian Coast Guard's emphasis on AIS highlights North America's role in driving the market's growth.
- North America is home to leading AIS technology providers that have made significant contributions to the market. For instance, exactEarth, headquartered in Canada, is a major player in satellite-based AIS solutions. They operate a constellation of satellites to provide real-time vessel tracking data globally. Similarly, companies like ORBCOMM and Kongsberg Maritime, based in the United States, offer AIS solutions and services, including hardware, software, and analytics, catering to the North American market and beyond.
- North America's defense and homeland security sectors have extensively adopted AIS technology for maritime surveillance and security purposes. For example, the United States Department of Defense (DoD) utilizes AIS data to enhance maritime domain

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awareness and monitor vessel movements for national security purposes. These applications of AIS in defense and homeland security underline the region's significance in the global market.

Automatic Identification System (AIS) Industry Overview

The global automatic identification system market is tending toward a fragmented market as the established players in the market dominate it. Due to significant innovations and increased partnerships by the players with Homeland Security agencies, the market is leading to a massive demand for AIS solutions. The recent developments in the market are:

In June 2022, the Singapore Maritime Institute (SMI) and the National Research Foundation Singapore formed the research and development partnership Rightship Maritime Artificial Intelligence (RMAI) research and development (R&D) to promote artificial intelligence (AI)-based vessel risk profiling. Software vendor Kongsberg Digital AS, technology company Wartsila Voyage Limited, and shipper RightShip are other partners. Rightship is offering a research grant of up to USD 4.5 million to more than 80 Singaporean AI professionals as part of a potential collaboration working proposal.

In June 2022, Accelleron, the renamed ABB Turbocharging subsidiary, signed two new data collecting and analysis collaborations with Hoppe Marine and Danelec Marine, respectively. The new joint service with Danelec will provide real-time operating data by combining Accelleron's Tekomar XPERT marine performance analysis system and the DanelecConnect maritime Internet of Things (IoT) product. Data will be collected from vessel systems such as the automation system, the voyage data recorder, the global positioning system (GPS), the electronic chart display and information system (ECDIS), the gyro compass, the engine, the propeller, the automatic identification system (AIS), and individual sensors. Tekomar XPERT will be used to examine the data and provide recommendations on possible efficiency enhancements and procedures to minimize downtime for maintenance or repairs in port.

Additional Benefits:

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

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