

Europe Border Security - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019-2029

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Report description:

The Europe Border Security Market size is estimated at USD 14.32 billion in 2024, and is expected to reach USD 20.75 billion by 2029, growing at a CAGR of 7.69% during the forecast period (2024-2029).

Since the essential infrastructure of a nation is the primary target of a terror outfit for inflicting mass casualties and causing substantial damage to the economy of the country, border security systems are considered to be the first line of defense against such attacks by disrupting the supply chain for the illegal movement of goods and people that can result in a security escalation at a later stage through the deployment of proper screening systems at several checkpoints.

The high cost of deployment for border surveillance systems such as UAVs and radar systems can hamper the market growth. These systems require significant financial and human resources for setup and maintenance during their service life.

The advent of intelligent fencing systems that can simultaneously access and deploy several sophisticated sensors and devices for data collection and processing is anticipated to revolutionize the border security market on a global level.

Europe Border Security Market Trends

Terrestrial Segment to Dominate Market Share During the Forecast Period

The surge in illegal infiltrations in Europe from the Middle East and African nations has aided the demand for land-based border security systems in the European region. The demand has escalated on account of the ongoing Russia-Ukraine conflict which has led to the mass exodus of the populace seeking refuge in neighboring countries.

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In 2022, Europe spent USD 480 billion on its military, as many European states are also part of NATO, with a commitment of 2% of defense expenditure to EU member states. The increasing military expenditure of the countries is fueling the procurement of modernization plans of armed forces for the procurement of advanced border protection. Europe has adopted automated border control systems for enhancing border security and managing the increasing volume of international travel within the region.

A sharp rise in terrorist activities in the past decade, globally, has resulted in security agencies focusing on the protection of national boundaries. The use of advanced explosives has augmented the need for developing new scanning and detection systems at checkpoints to counter emerging threats, which has led to the launch of multiple border security systems to cater to the demand and specifications of border security forces and homeland security agencies. The spending on border protection as per the European Commission's budget in the 2021-2027 budget period is expected to increase to almost USD 40 billion. An increased budget allocation is envisioned to foster the procurement and deployment of new border security systems, driving the growth prospects of the market in focus during the forecast period.

United Kingdom to Witness Highest Growth During the Forecast Period

The UK faces a substantial threat from terrorism, with transport infrastructure dealing with higher levels of threat. Higher levels of effective and visible protective security at national infrastructure sites are likely to act as a deterrent to terrorists, who attack 'soft' targets. Nevertheless, with the continual diversification of the threat, the ambition and capability of terrorist groups to target UK infrastructure is likely to continue to evolve.

The departure of the UK from the EU has increased the requirement for investment in UK border crossings. In 2020, the UK government allocated over USD 910 million for border infrastructure, technology, and new staff to ensure British border systems are fully operational at the end of the transition period through the Nationality and Borders Act.

The UK is currently developing its advanced surveillance capabilities. The UK government has dedicated additional spending on post-Brexit border crossings, to create an effective border by 2025. The focus is on infrastructure such as border control posts, IT systems and staffing, and seamless screening and scanning of cargo and personnel.

The UK Border Force uses a range of technology to assist with their searches, including carbon dioxide detectors and motion sensors as well as sniffer dogs to detect clandestine on-board lorries. ePassport gates are currently available for the UK and EU nationals to enable faster processing at the border checkpoints and airports. Efforts are being divested towards developing new border security and immigration systems that make better use of data, biometrics, analytics, and automation to improve both security and fluidity across the border.

Europe Border Security Industry Overview

The Europe border security market is fragmented with emerging local players with technological know-how threatening the dominance of market leaders, such as Indra Sistemas S.A., Leidos, Inc., RTX Corporation, Cobham Limited, and THALES. The new market players aim to gain leverage by providing an all-round solution at a fraction of the cost quoted by the leading players without compromising on the quality or reliability of their systems offerings. Thus, the vendors must provide advanced and high-performing border security to sustain market share and succeed in the intensely competitive market environment.

In-house manufacturing capabilities, global footprint network, product offerings, R&D investments, and a strong client base are the key areas to have the edge over competitors. Increasing cross-border threats are expected to fuel the market growth during the forecast period, making it an ideal time to adopt new border security systems. The competitive environment in the market is likely to intensify further due to an increase in product and service extensions, technological innovations, and mergers and

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acquisitions.

Additional Benefits:

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

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