

Military Biometrics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The military biometrics market is valued at USD 52.83 billion in 2024 and is anticipated to reach USD 74.55 billion by 2029, registering a CAGR of 7.13% during the forecast period (2024-2029).

The military biometrics market witnessed unprecedented challenges due to the COVID-19 pandemic. The advent of the pandemic led to various governments worldwide initiating lockdowns as well as closing down of borders. It led to an effect on the logistics as well as the supply of various raw materials that are required for the production of biometric systems for the military. In addition, the decline in the orders from defense forces owing to a fall in the defense budget coupled with layoffs by various defense companies ultimately affected the production and development of advanced biometric technologies for the military. The market showcased a strong recovery post-COVID due to the opening up of borders and removing lockdowns, thereby enabling key raw materials to reach the manufacturers. Also, various defense companies started increasing their investments in researching new technologies, and this is expected to lead to market growth in the near future.

The global war on terrorism brought an increased focus on biometric technology as a security solution for identifying and tracking suspected terrorists. It may drive the growth of the biometrics market in the coming years. Technological advancements, such as the development of binocular-shaped biometric cameras for iris recognition, may prove to be opportunities for the military for quick individual identification. Advancements in computer and related technologies led to biometric recognition being a highly automated process that drives market growth in coming years.

Military Biometrics Market Trends

Fingerprint Recognition Segment is Anticipated to Grow with the Highest CAGR During the Forecast Period

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The fingerprint recognition segment is expected to show significant growth during the forecast period. The growth is attributed to the increased defense budget of various countries around the world and the increasing need for the adoption of new biometric technologies by the worldwide defense forces. It is in order to precisely authenticate the identity of the person during complex battlefield missions.

Militaries around the world use biometrics for secure access control to facilities, equipment, and IT systems. It is also to identify adversaries in the field. Moreover, advanced biometric technology is utilized most frequently in defense & intelligence. It is mainly for recognizing the identity of a person and restricting the access of an unauthorized individual to the physical spaces within the confined area of military forces.

Currently, fingerprints are the most used biometric indicator, which is being used by the defense forces. Current technologies capture fingerprints in several different ways. The most common method is optical scanning, which makes use of prisms to measure the distance between the tiny ridges and valleys that form a fingerprint image. Another method uses thin film transistor (TFT) technology, which employs a small electrical current to measure those same ridges and valleys. A third method uses sound waves to capture fingerprints below the surface of the skin. Fingerprint scanners digitize these images into unique digital templates. It can then be used to match against existing records, thereby only allowing authorized personnel to gain access to any military facility and also to protect confidential data from leaking to the enemy.

Furthermore, growth in technologies regarding fingerprints known as Automated Fingerprint Identification System (AFIS), which Thales is currently developing, is a biometric identification system. It uses digital imaging technology to obtain, store, and analyze fingerprint data, thereby making it an essential tool for law enforcement agencies and defense personnel. It helps in the rapid and accurate identification of individuals based on their unique fingerprint patterns.

Thus, the growth in terms of defense expenditure of various countries globally, coupled with the increase in the development of advanced fingerprint sensors due to advancement in technology, will lead to the fingerprint recognition segment witnessing a positive outlook and significant market growth during the forecast period.

North America Will Showcase Remarkable Growth During the Forecast Period

North America is projected to show the highest growth during the forecast period. The increasing expenditure by various market players in North America in terms of investments in research, the growing need for the adoption of advanced biometrics by the defense personnel in the North American region, and the need for upgrading security capabilities are the major factors that will lead to military biometrics witnessing significant growth in North America in the near future.

Biometrics can be used in a variety of ways during military operations. It can also be employed to control access to a military installation by verifying that only authorized individuals are granted such access. Another use includes identifying individuals considered to pose a threat to friendly forces. Biometric technology was used in this manner by the US Army during the military operations which were conducted in Afghanistan and Iraq. Among other uses, devices that were capable of biometrically identifying persons were employed at checkpoints and by units on patrol to scan persons whom they encountered.

Advanced developments of biometric technologies, such as face authentication systems, among others, are expected to lead the market growth for biometrics for the military in North America. In addition, some of the agencies in the US are also looking forward to developing advanced biometric technologies in order to safeguard and prohibit unrecognized access. For instance, in October 2022, the Secretary of the Army signed the US Army Biometric Program, the first Army directive related to biometrics.

Thus, the growing need for expanding defense and security capabilities coupled with increasing technological developments will

lead to military biometrics witnessing a positive outlook and significant growth in market share in the North American region during the forecast period.

Military Biometrics Industry Overview

The military biometrics market is fragmented in nature, with various players holding significant shares in the market. Some prominent market players are Aware, Inc., Leidos, Inc., Fulcrum Biometrics, Inc., M2SYS, and IDEMIA, amongst others. The key players in the market are focusing on the development of advanced biometric systems, which will be used by various defense personnel worldwide in order to carry out complex battlefield missions. The growth in terms of expenditure on research and development towards manufacturing advanced biometric systems for the military will lead to creating better opportunities in the near future.

Moreover, various manufacturers are now integrating technologies such as iris and facial recognition in the biometric systems in order for the military to effectively identify persons of interest, and this is expected to support the growth of the military biometrics market during the forecast period.

Additional Benefits:

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

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