

North America Border Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Report description:

The North America Border Systems Market size is estimated at USD 21.28 billion in 2024, and is expected to reach USD 27.65 billion by 2029, growing at a CAGR of 5.38% during the forecast period (2024-2029).

Although North America witnessed fewer territorial conflicts, the United States is still investing in the development of advanced border security systems, such as perimeter breach detectors and coastal security systems, to limit the influx of illegal immigrants, trafficking, drug smuggling, and terrorism. The increase in defense spending in the region is propelling the market for surveillance aircraft, UAVs, coastal patrol boats, aerostats, etc. These are essential assets for border security, and they are constantly upgraded with advanced detection and imaging technologies for better performance.

Many combined initiatives, such as the North American Aerospace Defense Command (NORAD) and the International Boundary Commission (IBC), have been undertaken to increase cooperation and collaborations for technological developments. The deployment of biometric and biographical information-sharing solutions, underground sensors, machine learning algorithms, thermal imaging cameras, drones, etc., to identify understaffed border checkpoints, is propelling the growth of the market. Moreover, the development and adoption of advanced technologies, such as sensor-based detectors, advanced laser systems, shared intelligence networks, and artificial intelligence (AI), are propelling the growth of border security systems market in North America.

North America Border Systems Market Trends

Land Platform to Dominate Market Share During the Forecast Period

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The land segment holds the largest market share in the North America border security market, primarily due to its critical role in addressing various security challenges related to illegal immigration, smuggling, and other cross-border threats. Land-based border security solutions encompass a diverse range of technologies and infrastructure, including physical barriers, surveillance systems, and advanced sensors. The vast and varied topography of North America's land borders, shared between the US and Canada, as well as the US-Mexico border, necessitates a comprehensive and adaptable approach to security. Governments in the region have prioritized investments in advanced technologies such as ground-based radar systems, infrared cameras, and integrated command and control centers. The demand for land-based border security solutions is further driven by the need for real-time monitoring and rapid response capabilities. Enhanced situational awareness and the ability to deploy resources effectively contribute to the prominence of the land segment in the overall market, reflecting a strategic focus on securing terrestrial borders in North America. In June 2021, the Canada Border Services Agency invited 15 companies to submit proposals as the agency attempts to set up an Office for biometrics and identity management to develop and implement a strategy for biometrics to deal with border issues. In 2021, Canada's government earmarked USD 542 million investment in facial recognition and other technologies by the Canadian Border Services Agency (CBSA) in its 2021 annual budget. Similarly in February 2022, the US General Services Administration sanctioned USD 187 million funding for design and construction of the ALCAN Border Station. The new station will consolidate primary and secondary inspection areas and shield US Customs and Border Protection personnel from extreme weather.

United States is Anticipated to Dominate the Market During the Forecast Period

The US has the largest defense budget in the world, and a significant portion of that is spent on the development of border security solutions. The US has increased its spending on technological research and development. The rapid deployment of advanced systems for coastal patrol and surveillance is significantly driving the growth of the market in the country. The US Coast Guard is developing a new laser technology and enhancing the existing ones. The Coast Guard - Hailing Acoustic Laser-Light Tactical System (CG-HALLTS) is a tripod-mounted device with very focused acoustic capabilities, through which communication can be established between long distances, and it can also act as an eye-safe dazzling laser for suspect boats, ships, and vessels.

The United States is currently operating several drone surveillance missions alongside its border with Mexico to curb the illegal entry of immigrants, smugglers, and traffickers. Drones and UAVs are currently being used in synergy with sensors and AI to perform operations, such as aerial-based thermal imaging and facial recognition. Opto-electronics and thermal imaging technology are also witnessing developments in areas, such as weatherproof operations, and this factor is significantly propelling the growth of the border security systems market in the US. For instance, in April 2021, Leidos Holdings Inc. was awarded a USD 480 million contract by US Customs and Border Protection (CBP) to provide multi-energy portal (MEP) systems for nonintrusive inspections of commercial vehicles at land and sea entry ports. The award includes a base period of five years and options of up to 10 years, if exercised. The MEP systems will be deployed to existing vehicle inspection sites across the US. Under this contract, Leidos will integrate and deploy its vehicle and cargo inspection system MEP with low-energy backscatter and high-energy transmission cargo inspection system.

North America Border Systems Industry Overview

The North American border security market is fragmented. Some of the prominent players in the market are Elbit Systems Ltd., BAE Systems plc, Northrop Grumman Corporation, General Dynamics Corporation, and Teledyne FLIR LLC. The players in the market have developed expertise in specific platform-based security systems and cater to the needs of different agencies responsible for air, land, and maritime security in the region. The players are investing heavily in technological developments to meet the growing sophisticated needs of defense and security agencies. The main revenue generation strategy of players is winning long-term contracts and deals from security agencies and authorities. For instance, in October 2022, Microsoft received a USD 1.2 million contract to work on ArriveCan mobile application. The ArriveCan application was initially developed as a way for travelers to upload mandatory health information documents and information related to COVID-19 but has since become an

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optional way for users to answer customs and immigration questions.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
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