

## **North America Urban Security Screening - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The North America Urban Security Screening Market size is estimated at USD 2.19 billion in 2024, and is expected to reach USD 2.78 billion by 2029, growing at a CAGR of 4.87% during the forecast period (2024-2029).

With the increasing terror attack threats at various public and critical infrastructures, security screening is vital, especially for places like border checkpoints, government organizations, sports complexes, event stages, etc., to help mitigate the associated risk factor.

X-ray baggage scanning devices are used in high-security places like government offices, corporate establishments, and the Mass Rapid Transit System (MRTS). Optional features such as network supervisory workstation (NSW), video management, and threat image projection (TIP) are employed along with these scanners to make them more effective and efficient.

The national governments play a crucial role in developing smart cities to enhance their economic growth. They are acquiring infrastructure and passing regulations favoring the development of the security screening market across the innovative city sector. For instance, the United States House and Senate unanimously passed bipartisan legislation to maintain and improve career and technical education through creative learning to help Americans obtain skills needed for jobs.

Many companies are developing the automated security screening process, further driving the market's growth. For instance, Genetec launched a mission control solution to automate the screening process and establish effective and standardized procedures for staff and visitors to maintain proper health safety measures and minimize the risk of outbreaks.

Cost is frequently one of the first issues brought up. The initial investment in the metal detector is only a tiny portion of the

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overall resources required to run it. Walk-through metal detectors require ongoing maintenance in addition to an expensive initial purchase. The price of a fixed metal detector can range from USD 1,000 to USD 30,000. According to a National Institute of Justice assessment, models in the USD 4,000 to USD 5,000 price range often offer characteristics best suited for various environments.

Despite the COVID-19 pandemic, vendors in the market are progressing toward constructing data centers to cater to the strong demand from various end-user industries, further driving the market's growth. Demand for data centers in North America remains high. In March 2021, Amazon announced plans to fast-track the construction of three data centers in Loudoun County, Virginia, likely in response to the increasing demand for bandwidth due to the pandemic.

#### North America Urban Security Screening Market Trends

##### Government Buildings to be the Fastest Growing End-user

- The government significantly contributes to x-ray machines in government buildings. Government agencies are increasingly adopting digital imaging to enhance productivity and provide greater access to certain information types. The increasing spending on adopting X-ray machines is expected to boost the market's growth.
- Security concerns are a significant issue. Governments and private enterprises invest considerable amounts of money owing to growing terrorist activity in the region. Security checks and surveillance are an area of concern in government buildings like courthouses, embassy houses, parliament houses, government banks, libraries, etc., and other security-critical places with a potential risk of terrorist attacks.
- The Canadian government launched many New Federal Services Divisions focused on addressing the construction needs of the public sector, which drives the market's growth. For instance, in February 2022, Govan Brown, one of Canada's top 40 contractors, announced a new division for addressing the construction needs of the public sector and enhancing the value of Canada's national assets, including government property.
- According to the US Census Bureau, the value of federal public construction in the United States declined by over USD 4 billion in 2021.
- The companies in the market are incorporating advanced features in their products to serve a wide range of customers and generate revenue from them. For instance, in October 2021, VOTI Detection Inc., a Canadian technology company that develops advanced X-ray security systems based on 3D perspective technology, was awarded a three-year contract from Global Affairs Canada to supply x-ray scanning systems to Canadian embassy locations worldwide.
- The three-year contract included an initial order for 20 scanning systems to be delivered by January 2022. Global Affairs Canada was mandated to provide x-ray machines for threat screening at Global Affairs buildings in Canada and Canadian embassies worldwide.

##### United States is Expected to Hold a Major Market Share

- The current macro trends in firearms ownership, mass shootings, and pandemic awareness drive the region's demand for urban security screening equipment.
- Security is a priority for healthcare leaders in the United States. However, in the wake of mass shootings, several hospitals realized gaps in their safety strategies that must be addressed. According to EvolvTechnologies, 444 million privately-owned guns are in circulation in the United States. According to the Gun Violence Archive, in 2021, there were 693 mass shootings in the United States, a record in a year when most people were not free to gather. In June 2022, a mass shooting at a Tulsa, Oklahoma, hospital left four people dead, and a second hospital shooting occurred on the same day in Dayton, Ohio, causing prominent damage.

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- To mitigate such events, in August 2022, Northwell Health implemented advanced comprehensive detection systems to screen for weapons and contraband at the entrances of Long Island Jewish Medical Center in New Hyde Park, South Shore University Hospital in Bay Shore, and Lenox Health Greenwich Village in Manhattan as an effort to bring the technology to all hospitals in the health system.
- Correctional facilities in the United States are struggling to stem the flow of drugs into prisons and jails, particularly papers soaked with drugs and other harmful substances. When dried, drug-laced papers can be undetectable to humans, making the papers an ideal substrate for smuggling.
- Postal mail is a top way of smuggling illicit drugs and contraband into correctional facilities. The influx augmented the exposure risk for mail screeners and correctional officers to harmful substances and resulted in increased inmate overdoses and deaths. To combat this issue, in August 2022, RaySecur, a prominent provider of desktop T-ray security imaging scanners, announced an expansion of its T-Suite Image Processing Platform for detecting papers laced with illicit drugs. According to CBP, in 2022, till October, a total of 655,780 lbs of the drug got seized in the United States, further boosting the usage of x-ray screening products in the market.

## North America Urban Security Screening Industry Overview

The North American urban security screening market is fragmented with major players like 9.1 3DX-Ray Ltd, Astrophysics Inc., Bruker Corporation, and Evolv Technologies. These companies are adopting various strategies to expand their market share, including product development, mergers, and geographic expansions.

In September 2022, the US transportation security administration (TSA) added Smiths Detection's HI-SCAN 6040 CTiX X-ray scanner to its Checkpoint Property Screening System (CPSS) Mid-Size Qualified Products List (QPL). This scanning system was designed to produce high-quality 3D images to facilitate faster baggage assessment using visual operator inspection and automated object recognition.

In February 2022, Evolv Technology announced enhancements to Evolv Express. It is the first system to integrate weapons screening and detection data collected at venue entrances with Milestone Video Management System (VMS) and Titan HST mass notification system, further expanding Evolv Express' screening intelligence to complementary security technologies and simplifying and improving management for venue's security professionals.

### Additional Benefits:

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

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