

Electronic Offender Monitoring Solutions - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 130 pages | Mordor Intelligence

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Report description:

The Electronic Offender Monitoring Solutions Market size is estimated at USD 2.18 billion in 2025, and is expected to reach USD 3.19 billion by 2030, at a CAGR of 7.91% during the forecast period (2025-2030).

Electronic monitoring (EM), often referred to as e-monitoring or e-tagging, is predominantly employed for offenders placed under house arrest. This pre-trial confinement method permits defendants to remain at home until their trial concludes. EM utilizes electronic devices to oversee and track the movements and behaviors of individuals. Such devices encompass ankle bracelets, mobile applications, wristbands, and other tools designed to monitor an individual's movements.

Key Highlights

- Globally, rising crime rates are significantly propelling the studied market. In their quest to manage offenders beyond conventional incarceration, governments are turning to electronic monitoring systems. These systems not only bolster public safety but also aim to curtail recidivism. Moreover, technological strides, especially the incorporation of biometrics and GPS tracking, are further energizing the market. Such innovations boost the precision and dependability of monitoring systems, allowing law enforcement to monitor offenders in real time and swiftly address any breaches, thereby enhancing community safety.
- Electronic Offender Monitoring utilizes cutting-edge technologies and services to supervise offenders in real time. With electronic monitoring, individuals wear a tamper-resistant transmitter on their ankle or wrist around the clock. This transmitter sends out a radio frequency (RF)/GPS signal, which is picked up by a receiver unit linked to the home phone. Once the transmitter is within the receiver's range, the unit notifies the monitoring center, confirming the individual's presence at home.
- Electronic Monitoring (EM), commonly paired with home detention, tracks an offender's location via specialized devices. EM serves as an alternative to traditional detention and includes a diverse array of tools: home monitoring devices, ankle and wrist

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- bracelets, field monitoring gadgets, alcohol and drug testing instruments, voice verification systems, and GPS technology.
- As public safety demands surge and the need for efficient criminal justice management intensifies, the electronic offender monitoring solution market is witnessing significant growth. Increased awareness about rehabilitating and overseeing offenders further accelerates the adoption of these solutions. Technological advancements, especially in RFID and GPS, enhance the accuracy and effectiveness of monitoring systems.
- Additionally, the integration of artificial intelligence and data analytics provides crucial insights, enabling law enforcement agencies to make informed decisions and driving the market's growth. Despite their advantages, the cost of these solutions remains a significant challenge. A survey by Kent County Administration highlights that the daily rate for electronic monitoring (EM) services is approximately USD 2.95 per unit. This rate covers active supervision, with units making calls every 10 minutes and providing GPS track points 3-4 times per minute.
- In many countries, ongoing disinflation hints at potential interest rate cuts. As of April 2024, the euro area's headline inflation stands at 2.4%, with core inflation also slowing. Yet, despite these positive signs, several European nations still contend with high inflation rates, necessitating caution in monetary policy adjustments. The IMF anticipates the European Central Bank (ECB) will start rate cuts in June, reducing its policy rate by 25 basis points each quarter, targeting a neutral stance of 2.5% by September 2025.

Electronic Offender Monitoring Solutions Market Trends

Solutions Segment is Expected to Hold Significant Share

- The electronic offender monitoring solutions segment encompasses many features, including RF house arrest, home detention, GPS tracking, victim protection, and mobile apps for domestic violence. It also covers non-fitted solutions and monitoring for alcohol and drugs. These systems offer police, authorities, and government agencies a robust and cost-effective means to mitigate reoffending across diverse offender categories.
- As domestic violence cases rise, the demand for effective solutions grows, creating opportunities in the market. For example, data from the Government of Portugal reveals that Portugal recorded 30,461 incidents of domestic violence. While this figure shows a slight decrease from the previous year, it remains notably higher than the counts from 2016. Other countries mirror this trend. For instance, data from the Government of Mexico indicates that in 2023, Mexico reported approximately 284,203 domestic violence cases. Mexico City led with over 37,000 cases, making it the federal entity with the highest reports, trailed by Mexico State at 28,650 cases.
- Electronic offender monitoring solutions enable swift and precise offender location, aiding criminal investigations and prosecutions. Such advantages are poised to bolster the market's demand for electronic offender monitoring solutions. Numerous private firms are active in this domain, offering a suite of services from equipment development and installation to monitoring and ancillary support.
- In North America, Latin America, and select European jurisdictions, private sector companies predominantly manage electronic monitoring (EM) programs. Key electronic offender monitoring solutions market players include US-based firms like BI Inc. (part of The GEO Group, Inc.), Sentinel Offender Services, Allied Universal Electronic Monitoring, SCRAM Systems, Securus Technologies, ShadowTrack, and Track Group. Other notable companies span the globe: UK-based Buddi, Israel's SuperCom, Poland's Enigma (COMP), Switzerland's Geosatis, and Brazil's Spacecom S.A. and Synergie.
- Various companies collaborate closely with governments to provide offender monitoring solutions as per the customized requirements. For example, Fulton County Jail has recently grappled with significant challenges. The Fulton County Sheriff's Office, which manages several jails in the Atlanta vicinity, has obtained extra funding to tackle these persistent issues. They are rolling out a state-of-the-art surveillance system designed for accurate inmate tracking. Hundreds of sensors are embedded in the walls of jails throughout the region. These sensors, operating on radio frequencies, link up with wristbands worn by inmates. This advanced system, crafted by Talitrix in Georgia, boasts capabilities like monitoring an inmate's heartbeat, tracking their location

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every 30 seconds, and producing 3D visuals to discern individual interactions.

North America Holds Largest Market Share

- EM has solidified its position as a viable alternative to detention throughout North America. Significantly, since 2005, the U.S. has seen its reliance on EM surge nearly tenfold. This uptick in EM adoption has paralleled a notable decline in the nation's prison population.
- In recent years, enacting the First Step Act (FSA) in 2018 marked a significant pivot in U.S. criminal justice policies. This bipartisan initiative underscores a dedication to bettering outcomes, curbing federal prison numbers, and bolstering public safety. Additionally, the Reauthorization Act introduces modifications to programs that support home confinement for select elderly and terminally ill inmates. In the latter half of 2023, several studies emerged, shedding light on the effectiveness of FSA programs, particularly spotlighting segments of the prison population that were transitioned to home confinement under electronic monitoring.
- In Canada, the government initiated a program to electronically monitor federal offenders, safeguard communities, and equip the Correctional Service of Canada and police with tools to deter crime. Recently, the Alberta government rolled out an ankle bracelet monitoring initiative targeting high-risk offenders. Per the proposed Public Safety Statutes Amendment Act, 2024, those under court-ordered electronic monitoring must wear a Global Positioning System (GPS) tracking device on their ankle. This device will be under the constant surveillance of a centralized monitoring unit within Alberta Correctional Services. Such jurisdictional changes are poised to bolster the studied market demand.
- According to the Vera Institute of Justice's report, "People on Electronic Monitoring," the use of electronic monitoring (EM) in North America's criminal legal system has surged. In the U.S., over 150,000 individuals are under EM at any moment as part of state and local monitoring systems. Vera's researchers highlight a notable trend: an uptick in EM usage frequently parallels a rise in jail populations. This was evident in Detroit, Michigan, where a 41% surge in EM usage coincided with a 60% jump in jail population. The report underscores this correlation: "Most local jurisdictions with a high EM rate also had a high jail incarceration rate."
- EM is emblematic of a broader trend in the region, where governments increasingly delegate criminal and immigration supervision to private entities. A case in point: The GEO Group, Inc., a private prison firm, spearheaded a U.S. pilot initiative placing hundreds of migrants intercepted at the U.S.-Mexico border under house arrest.
- Furthermore, as of May 4, 2024, Immigration and Customs Enforcement (ICE) has seen a rapid uptick in using BI Incorporated's VeriWatch wrist-worn GPS device, marking it as their premier electronic monitoring tool. Recent figures reveal a jump from 1,441 to 2,153 immigrants under VeriWatch in just two weeks. This trend is particularly pronounced in ICE's Harlingen (324), Los Angeles (298), and Seattle (294) regions. These continuous developments and integrations have demonstrated a major inclination of North American countries towards incorporating electronic offender monitoring solutions in the region.

Electronic Offender Monitoring Solutions Industry Overview

In the electronic offender monitoring solution market, players from both global and regional backgrounds vie intensely for dominance. Key competitive factors encompass pricing, product offerings, market share, and the vigor of market engagement. Leading companies harness their research and development (R&D) prowess and consolidation tactics to wield considerable influence. However, the market not only sees high penetration but is also becoming increasingly fragmented.

In this arena, innovation emerges as the bedrock for a lasting competitive edge. To maintain their positions, established players are focusing on product differentiation and expanding their market presence. Market vendors prominently employ strategies such as acquisitions, collaborations with industry vendors, and launching new products/services.

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Some of the major players in the market are SCRAM Systems (Alcohol Monitoring Systems, Inc.), SuperCom Ltd., Allied Universal Security Services, LLC, Sentinel Offender Services, LLC, and BI Incorporated.

Additional Benefits:

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

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