

Anti-money Laundering (AML) Market by Offering (Solutions (KYC/CDD & Sanctions Screening, Transaction Monitoring, Case Management & Reporting)), End User (Banks & Financial Institutes, Insurance, Gaming & Gambling), and Region - Global Forecast to 2030

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Report description:

The global AML market size is projected to grow from USD 4.13 billion in 2025 to USD 9.38 billion by 2030 at a Compound Annual Growth Rate (CAGR) of 17.8% during the forecast period. High rates of digital payment adoption in Australia, Singapore, and India have led to the development of more robust compliance infrastructures for monitoring transactions in real-time. The increasing sophistication of financial crimes is leading institutions to construct infrastructure that provides a 360-degree picture of customer and transaction information. This involves combining KYC information, transactional activity, and third-party information across departments to enhance anomaly detection and simplify regulatory reporting, ultimately enhancing AML capabilities. The rise in digital payments and online banking has significantly accelerated financial transactions, posing a significant risk of illegal activities and necessitating robust AML measures.

"By solution, the transaction monitoring segment is expected to grow at the highest CAGR during the forecast period."

The transaction monitoring segment is experiencing rapid growth in the AML market, which is being fueled by the rising volume of online transactions and increased regulatory expectations. Banks are facing mounting pressure to identify suspicious activity in real-time, and hence, there is a move toward sophisticated monitoring systems. For example, Citigroup has significantly invested in its compliance infrastructure. Citi, in 2023, spent USD 2.9 billion on transformation spend, which had a significant focus on regulatory compliance automation and improving transaction monitoring processes. These investments indicate the requirement for effective, scalable solutions that can process high volumes of transactional data. Financial crimes being increasingly sophisticated and cross-border in nature, real-time monitoring, integrated analytics, and reporting with ease are key features desired by institutions. Thus, transaction monitoring systems are becoming crucial to combat money laundering and are likely to

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be one of the most vital growth areas in the AML technology ecosystem.

The US is expected to hold the largest market size in the North American region during the forecast period.

The US has the largest market size in the North America region in the AML market because it has a vast financial sector, a strong regulatory environment, and a high risk of financial crime. The US has put in place a strong legal and enforcement framework for AML compliance, such as the Bank Secrecy Act (BSA), the USA PATRIOT Act, and regulations enforced by the Financial Crimes Enforcement Network (FinCEN). These regulations require extensive customer due diligence, transaction monitoring, and reporting of suspicious transactions. The nation has the world's largest banks and financial institutions that process large volumes of transactions and have operations in multiple markets around the globe, exposing them to a higher risk of money laundering. US regulators have imposed large fines on banks for non-compliance, providing them with powerful incentives to embrace sophisticated AML technologies. Growth in cyber-facilitated financial crimes and the growing popularity of digital payments drove demand for AI- and analytics-driven AML solutions. Along with these, the mature fintech ecosystem and government efforts to upgrade the AML infrastructure contribute to the country's dominance in the AML market.

Breakdown of primaries

The study contains insights from various industry experts, from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

- By Company Type: Tier 1 - 35%, Tier 2 - 45%, and Tier 3 - 20%
- By Designation: C-Level - 40%, Managerial and Other Levels- 60%
- By Region: North America - 45%, Europe - 35%, Asia Pacific - 20%

Major vendors in the global AML market include LexisNexis (US), Oracle (US), FIS (US), Fiserv (US), Jumio (US), NICE Actimize (US), SAS Institute (US), GB Group PLC (UK), FICO (US), ACI Worldwide (US), Experian (Ireland), Wolters Kluwer (Netherlands), Transunion (US), ComplyAdvantage (UK), Friss (Netherlands), Nelito Systems (India), Comarch (Poland), Allsec Technologies (India), Dixtior (Portugal), Temenos (Switzerland), TCS (India), Featurespace (UK), Feedzai (Portugal), Napier AI (UK), Tier1 Financial Solutions (Canada), Finacus Solutions (India), SymphonyAI (US), IDMERIT (US), IMTF (Switzerland), Innovative Systems (US), Sedicii (Ireland), Trulioo (Canada), NameScan (Australia), DataVisor (US), and Gurukul (US).

The study includes an in-depth competitive analysis of the key players in the AML market, their company profiles, recent developments, and key market strategies.

Research Coverage

The report segments the AML market and forecasts its size by offering (solutions and services), Solution (KYC/Customer Due Diligence & sanction screening, transaction monitoring, and case management and reporting), deployment mode (on-premises and cloud), organization size (large enterprises and SMEs), and end user (banks and financial institutes, insurance, and gaming & gambling).

The study also includes an in-depth competitive analysis of the market's key players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report

The report will help market leaders and new entrants with information on the closest approximations of the revenue numbers for the overall AML market and the subsegments. It will also help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (increased monetary penalties, regulatory sanctions, and reputational loss due to non-compliance with regulations, rise in focus toward digital payments and Internet banking, and necessity to create infrastructure with a 360-degree view of data in the financial landscape), restraints (increased technological complexities and sophistication of attacks, and budgetary issues in developing in-house fraud detection solutions), opportunities (higher adoption of advanced analytics in AML, integration of AI, ML, and big data technologies in developing AML solutions, adoption of cloud-based AML solutions to combat financial crimes, and increased use of AML in real-estate sector), and challenges (lack of skilled AML professionals with in-depth knowledge, lack of awareness related to government regulations and deployment of AML solutions).

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- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and product & service launches in the AML market.
- Market Development: Comprehensive information about lucrative markets - the report analyzes the AML market across varied regions.
- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the AML market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players in AML market strategies, including LexisNexis (US), Oracle (US), FIS (US), Fiserv (US), and Jumio (US).

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