Europe Security Screening Market to 2027 - Regional Analysis and Forecasts by Product (X-Ray Scanner, Biometric Systems, Explosive Trace Detector, Electromagnetic Metal Detector); Application (Border Check point, Airport, Government, Public Places, Others)

The Europe security screening market accounted for US$ 1.51 Bn in 2018 and is expected to grow at a CAGR of 5.8% over the forecast period 2019–2027, to account for US$ 2.59 Bn in 2027. The unexpected incidences that resulted in terrorist attacks due to weak security and expansion of airport infrastructure owing to the increase in the air passenger traffic are boosting the security screening market growth. Moreover, the increasing development of urban infrastructure is expected to boost the security screening market. From last few years, some nations have witnessed incidences that resulted in terrorist attacks owing to weak security checks at various places including, airports, seaports, railway stations, and hotels, among others. For instance, in March 2016, departure hall of Brussels' Zaventem International Airport and the Maalbeek metro station were attacked by terrorists killing over 30 people. Three months later, Istanbul Ataturk Airport's parking as well as the entrance of international arrival terminal was attacked by terrorists, killing 41 people. Further, terrorists have previously targeted Parliament buildings, railway stations, shopping malls, and other such crowded places. Thus, the need to deploy proper security checks at these places have become significant in order to fight against such threats. This, in turn, is driving the growth of security screening market.

The security screening market is fragmented in nature due to the presence of several industries, and the competitive dynamics in the market is anticipated to change during the coming years. In addition to this, various initiatives are undertaken by governmental bodies to accelerate the security screening market further. For instance, The European Commission has passed a framework mandating all airports and airport operators to upgrade their Hold Baggage Screening complying with ECAC’s Standard 3 approved EDS. Airports are given a timeline to implement these by 2020 in European countries, and by 2022 in critical circumstances. Standard 3 necessitates the use of advanced systems comprising of Computed Tomography (CT) technology. This would result in the installation of new scanners in the airports across the region. Further, the European commission’s Digit Single Market strategy is focused on supporting and encouraging online opportunities in Europe, thereby, bolstering the growth of the e-commerce market in Europe. With the rising e-commerce market, the demand for security scanners is anticipated to increase.

The Europe security screening market by product is dominated by the X-Ray Scanner segment in the year 2018 and is anticipated to continue its dominance showcasing a substantial growth rate in the forecast period. Security screening market by product is segmented by x-ray scanner, biometric systems, electromagnetic metal detector, and explosive trace detector. The demand for X-ray security scanner is expected to continue to grow at a minimal rate during the forecast period, mainly driven by constant geopolitical unrest in several geographic regions and the resulting terrorist and criminal threats. A large share of these x-ray security scanner deployments are government-funded; therefore, budget constraints affect the overall market revenues.

On the other hand, growing installed equipment base creates noteworthy prospects for the aftermarket, which includes service and support services through the sale of software upgrades. The major demand for these devices comes from sectors such as airways, ports, parcels, land security, and public places.

The overall security screening market size has been derived using both primary and secondary source. The research process begins with exhaustive secondary research using internal and external sources to obtain qualitative and quantitative information related to the security screening market. It also provides an overview and forecast for the security screening market based on all the segmentation provided with respect to the European region. Also, primary interviews were conducted with industry participants and commentators to validate data and analysis. The participants who typically take part in such a process include industry expert such as VPs, business development managers, market intelligence managers, and national sales managers, and external consultants such as valuation experts, research analysts, and key opinion leaders specializing in the security screening market. Some of the players present in security screening market are Aware, Inc., Anviz Global, Analogic Corporation, Astrophysics Inc., L3 Security & Detection Systems, Magal Security Systems Ltd, Nuctech Company Limited, OSI Systems, Inc., Smiths Detection Inc., and Teledyne ICM (Teledyne Technologies Incorporated) among others.

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