

Airport Systems Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

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Abstracts

The Global Airport Systems Market was valued at USD 31.5 billion in 2024 and is estimated to grow at a CAGR of 8.1% to reach USD 68.2 billion by 2034. The growth trajectory of this market is primarily fueled by the surge in air passenger volumes worldwide and the ongoing expansion of regional airport infrastructure. As more travelers take to the skies, airports are under increasing pressure to enhance their operational capabilities, upgrade aging systems, and adopt smarter, automated solutions. These changes are vital to managing growing foot traffic efficiently while adhering to evolving safety and regulatory standards.

In recent years, the market has faced significant challenges due to trade policies that raised import tariffs on key components such as radar units, biometric devices, and surveillance technology sourced from major regions. These tariffs placed a financial strain on system manufacturers and integrators, especially in the United States, leading to increased costs and extended project timelines. Capital expenditure requirements rose sharply, forcing several airports, particularly smaller ones, to delay or scale down modernization projects. On the flip side, this disruption sparked a notable pivot toward local sourcing and domestic production of electronic systems, accelerating investments in homegrown R&D for advanced airport technologies. The broader outcome has been a boost to innovation and more localized supply chains, improving resilience across the sector.

The market is categorized by installation type into new installations and retrofit or upgrade projects. In 2024, the retrofit and upgrade segment held a significant share, valued at USD 17.2 billion. This growth is largely driven by the need to replace outdated infrastructure, especially in mature markets. Rather than building new terminals, airports are prioritizing cost-effective enhancements that reduce operational downtime and

facilitate quicker deployment. These upgrades include integrating AI-driven analytics, advanced biometric systems, and modular IT solutions that align with emerging travel norms and security requirements.

By type, the market is segmented into several categories, including systems for passenger processing, airport operations, air traffic management, security and surveillance, ground handling and maintenance, retail and commercial functions, and others. Passenger processing systems led the segment with a 22.2% market share in 2024, thanks to growing reliance on automation to streamline check-ins, identity verification, and boarding processes. The adoption of touchless tech and mobile platforms is enabling airports to process more travelers without increasing physical infrastructure, thereby enhancing overall passenger flow and satisfaction.

The application of airport systems spans across airside, landside, and terminal side operations. The airside segment emerged as a key contributor, valued at USD 12.9 billion in 2024. Its expansion is linked to continuous upgrades in flight handling, air traffic navigation, and ground movement coordination. With the frequency of flights on the rise, airports are implementing more sophisticated radar, communication, and apron control systems to ensure safe and efficient operations. Investments in modernizing control towers and integrating digital apron management technologies are also playing a pivotal role in advancing this segment.

In the United States, the airport systems market was valued at USD 8.6 billion in 2024, reflecting the country's extensive network of airports and its proactive approach to infrastructure enhancement. Consistent government funding and a focus on incorporating smart technologies into airport operations have enabled sustained growth. U.S. airports are increasingly prioritizing digitalization in areas such as traffic control, terminal management, and security enforcement, helping to drive demand for advanced system solutions.

The competitive landscape of the market is characterized by a mix of established global players and agile regional vendors. Four major companies collectively accounted for a 20.1% share in 2024. These key players offer integrated system solutions that span the full spectrum of airport operations, leveraging cutting-edge tools like AI, biometric identification, and Internet of Things (IoT) platforms. Their global footprint, strategic collaborations with airport authorities, and strong focus on R&D give them a notable advantage in both developed and emerging markets.

Meanwhile, smaller and regional vendors are carving out their space by offering cost-

effective, tailored solutions that cater to specific operational or compliance-related needs. Many airport operators are forming strategic partnerships with software developers and hardware manufacturers to ensure smooth, end-to-end system integration. As airports race to enhance efficiency and passenger experience, innovation in data analytics, cybersecurity, and automation continues to fuel market competitiveness. The focus on scalable, future-proof technology and reliable service support is becoming central to long-term success in the evolving airport systems landscape.

Companies Mentioned

Amadeus IT Group, Axis Communications AB, BEUMER Group, CISCO Systems Inc., Daifuku Co., Ltd., Frequentis AG, Honeywell International Inc., Huawei Technologies Co., Ltd., Indra, KEENFINITY, L3Harris Technologies, Inc., Leidos, MAGOS SYSTEMS, NEC Corporation, Panasonic, RESA, RTX Corporation, Siemens Logistics LLC, SITA, Smiths Detection Group, Thales Group, TK Elevator, Vanderlande Industries B.V.

Contents

CHAPTER 1 METHODOLOGY & SCOPE

- 1.1 Market scope & definitions
- 1.2 Base estimates & calculations
- 1.3 Forecast calculations
- 1.4 Data sources
 - 1.4.1 Primary
 - 1.4.2 Secondary
 - 1.4.2.1 Paid sources
 - 1.4.2.2 Public sources

CHAPTER 2 EXECUTIVE SUMMARY

- 2.1 Industry synopsis, 2021-2034

CHAPTER 3 INDUSTRY INSIGHTS

- 3.1 Industry ecosystem analysis
- 3.2 Trump administration tariffs analysis
 - 3.2.1 Impact on trade
 - 3.2.1.1 Trade volume disruptions
 - 3.2.1.2 Retaliatory measures
 - 3.2.2 Impact on the industry
 - 3.2.2.1 Supply-side impact
 - 3.2.2.1.1 Price volatility in
 - 3.2.2.1.2 Supply chain restructuring
 - 3.2.2.1.3 Production cost implications
 - 3.2.2.2 Demand-side impact
 - 3.2.2.2.1 Price transmission to end markets
 - 3.2.2.2.2 Market share dynamics
 - 3.2.2.2.3 Consumer response patterns
 - 3.2.3 key companies impacted
 - 3.2.4 strategic industry responses
 - 3.2.4.1 Supply chain reconfiguration
 - 3.2.4.2 Pricing and product strategies
 - 3.2.4.3 Policy engagement
 - 3.2.5 Outlook and future considerations

3.3 Impact forces

3.3.1 Growth drivers

3.3.1.1 Growth in regional airports

3.3.1.2 Rising global air passenger traffic

3.3.1.3 Airport modernization and expansion projects

3.3.1.4 Airspace congestion driving ATM investments

3.3.1.5 Integration of IoT and real-time data analytics

3.3.2 Industry pitfalls & challenges

3.3.2.1 High capital expenditure and integration costs

3.3.2.2 Cybersecurity risks

3.4 Growth potential analysis

3.5 Technological & innovation landscape

3.6 Key news and initiatives

3.7 Future market trends

3.8 Porter's analysis

3.9 PESTEL analysis

3.10 Regulatory landscape

CHAPTER 4 COMPETITIVE LANDSCAPE, 2024

4.1 Introduction

4.2 Company market share analysis

4.3 Competitive positioning matrix

4.4 Strategic outlook matrix

CHAPTER 5 MARKET ESTIMATES & FORECAST, BY TYPE, 2021-2034 (USD BILLION)

5.1 Key trends

5.1.1 Passenger processing systems

5.1.2 Self-check-in kiosks

5.1.3 Biometric identification & verification systems

5.1.4 Boarding gate systems

5.1.5 Others

5.2 Airport Operations Systems

5.2.1 Flight information display systems (FIDS)

5.2.2 Resource management systems (RMS)

5.2.3 Baggage handling systems (BHS)

5.2.4 Passenger flow management systems

- 5.2.5 Others
- 5.3 Air traffic management (ATM) systems
 - 5.3.1 Radar surveillance systems
 - 5.3.2 Communication systems
 - 5.3.3 Navigation systems
 - 5.3.4 Others
- 5.4 Security & surveillance systems
 - 5.4.1 CCTV and video surveillance
 - 5.4.2 Access control systems
 - 5.4.3 Threat detection & screening systems
 - 5.4.4 Perimeter security systems
 - 5.4.5 Others
- 5.5 Ground handling & maintenance systems
 - 5.5.1 Ramp operations management
 - 5.5.2 Ground support equipment (GSE) tracking
 - 5.5.3 Aircraft docking guidance systems
 - 5.5.4 Others
- 5.6 Retail & commercial systems
 - 5.6.1 Point-of-Sale (POS) systems
 - 5.6.2 Digital signage & advertising platforms
 - 5.6.3 Others
- 5.7 Others

CHAPTER 6 MARKET ESTIMATES & FORECAST, BY APPLICATION, 2021-2034 (USD BILLION)

- 6.1 Key trends
- 6.2 Airside
- 6.3 Landside
- 6.4 Terminal side

CHAPTER 7 MARKET ESTIMATES & FORECAST, BY INSTALLATION, 2021-2034 (USD BILLION)

- 7.1 Key trends
- 7.2 New installations
- 7.3 Retrofit/upgrade

CHAPTER 8 MARKET ESTIMATES & FORECAST, BY REGION, 2021-2034 (USD

BILLION)

8.1 Key trends

8.2 North America

8.2.1 U.S.

8.2.2 Canada

8.3 Europe

8.3.1 UK

8.3.2 Germany

8.3.3 France

8.3.4 Italy

8.3.5 Spain

8.3.6 Netherlands

8.4 Asia Pacific

8.4.1 China

8.4.2 India

8.4.3 Japan

8.4.4 South Korea

8.4.5 Australia

8.5 Latin America

8.5.1 Brazil

8.5.2 Mexico

8.6 MEA

8.6.1 South Africa

8.6.2 Saudi Arabia

8.6.3 UAE

CHAPTER 9 COMPANY PROFILES

9.1 Amadeus IT Group

9.2 Axis Communications AB

9.3 BEUMER Group

9.4 CISCO Systems Inc.

9.5 Daifuku Co., Ltd.

9.6 Frequentis AG

9.7 Honeywell International Inc.

9.8 Huawei Technologies Co., Ltd.

9.9 Indra

9.10 KEENFINITY

- 9.11 L3Harris Technologies, Inc.
- 9.12 Leidos
- 9.13 MAGOS SYSTEMS
- 9.14 NEC Corporation
- 9.15 Panasonic
- 9.16 RESA
- 9.17 RTX Corporation
- 9.18 Siemens Logistics LLC
- 9.19 SITA
- 9.20 Smiths Detection Group
- 9.21 Thales Group
- 9.22 TK Elevator
- 9.23 Vanderlande Industries B.V.

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