

# Electronic Toll Collection Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2023-2028

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## Abstracts

The global electronic toll collection market size reached US\$ 10.3 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 18.0 Billion by 2028, exhibiting a growth rate (CAGR) of 9.4% during 2023-2028. The growing trend of automating various tasks, increasing utilization of smart tags on vehicles, and rising advancement in information technology (IT)-related technologies and smart transportation services represent some of the key factors driving the market.

### Rising Initiatives to Streamline Flow of Traffic and Reduce Congestion Augmenting Market Growth

The increasing initiatives undertaken by governing agencies of various countries to improve the overall transportation facilities and reduce traffic congestion are propelling the growth of the electronic toll collection market. In addition, traffic congestion is the prime cause behind the increasing vehicle queuing in toll booths, which wastes the time of drivers and causes mismanagement of taxes. Apart from this, the rising utilization of electronic toll collection (ETC) systems to increase productivity, minimize operational expenses, and reduce the occurrence of mistakes is contributing to the growth of the market. Furthermore, the increasing employment of smart ticketing systems in various public places to reduce the usage of paper tickets and fasten the overall process is bolstering the growth of the market.

Competitive analysis such as market structure, market share by key players, player positioning, top winning strategies, competitive dashboard, and company evaluation quadrant has been covered in the report. Also, detailed profiles of all major companies have been provided. The market structure is fragmented with a large number of

hardware, software, and solution providers at local, regional, and international levels. The product differentiation rate is low as products offered by various manufacturers are largely the same in terms of their functionality and features. The volume of new entrants in the market is moderate due to the requirement for technical competency and high capital investments.

### What is Electronic Toll Collection?

Electronic toll collection (ETC) refers to an automated mechanism or system that utilizes various sophisticated cameras and sensors to carry out operations in a toll booth. It also relies on various advanced solutions, such as video analytics, dedicated short-range communications (DSRC), a global positioning system (GPS), and a global navigation satellite system (GNSS), for the collection of toll taxes and tracking the vehicles passing through the toll booths. It is often integrated with radio frequency identification (RFID) technology that triggers the transponder installed at the toll booth, and an electric payment system charges the toll and deducts the amount from the account of the vehicle owner. It helps reduce congestion around the toll booths, fasten toll transaction processes, and save travel time for drivers. It also provides cashless payment options, which are highly convenient to individuals who are in a rush and do not have the time to stop and pay the toll charges in cash. ETC can capture images of the registration plates of vehicles and can scan the transponders attached to them to collect tolls automatically when the vehicle passes through the toll booth. It also helps in tracking stolen vehicles and managing over-speeding vehicles to prevent the occurrence of road accidents. Furthermore, as ETC is entirely automated and does not require to be managed by humans, it reduces the overall operational costs of toll booths.

### COVID-19 Impact:

The outbreak of COVID-19 has severely impacted the electronic toll collection market around the world. In addition, due to lockdowns and social distancing, the supply chain of various raw materials has been disturbed. Also, the limited transportation and traveling activities worldwide reduced the demand for electronic toll collection systems. The pandemic also hampered the condition of manufacturing units as the supply of various crucial components required in the production of electronic toll collection systems stopped. Apart from this, the restrictions imposed on road movement, along with the increasing number of COVID cases around the world, influenced individuals to stay at home and refrain from traveling on the roads, which severely impacted the growth of the market. Additionally, the closing down of various major ports, along with the restrictions imposed on international trade activities, affected the demand for

electronic toll collection systems in the global marketplace.

#### Electronic Toll Collection Market Trends:

At present, the increasing demand for ETC systems due to the rising trend of automating various tasks represents one of the primary factors influencing the market positively. Besides this, the growing advancement in information technology (IT)-related technologies and smart transportation services is offering a favorable market outlook. In addition, the rising utilization of smart tags on vehicles, along with automatic parking services in various public places, is propelling the growth of the market. Apart from this, the increasing adoption of ETC systems, as they provide comprehensive and detailed information about toll charges levied on any vehicle, is contributing to the growth of the market. Additionally, governing agencies of various countries are investing in improving their transportation and logistics infrastructure, which is bolstering the growth of the market.

#### Key Market Segmentation:

IMARC Group provides an analysis of the key trends in each sub-segment of the global electronic toll collection market report, along with forecasts at the global, regional and country level from 2023-2028. Our report has categorized the market based on technology, system, subsystem, offering, toll charging and application.

#### Technology Insights:

RFID  
DSRC  
Others

The report has provided a detailed breakup and analysis of the electronic toll collection market based on the technology. This includes RFID, DSRC, and others. According to the report, RFID represented the largest segment as it simplifies toll collection process and increases operational efficiency. In addition, the increasing adoption of RFID to reduce traffic congestion is propelling the growth of the respective segment.

#### System Insights:

Transponder - or Tag-Based Toll Collection Systems  
Other Toll Collection Systems

A detailed breakup and analysis of the electronic toll collection market based on the system has also been provided in the report. This includes transponder - or tag-based toll collection systems and other toll collection systems. According to the report, transponder - or tag-based toll collection systems accounted for the largest market share as they are highly efficient in the identification of vehicles. Apart from this, the rising utilization of transponder - or tag-based toll collection systems to reduce waiting time for drivers in toll booths is propelling the growth of the market.

#### Subsystem Insights:

- Automated Vehicle Identification
- Automated Vehicle Classification
- Violation Enforcement System
- Transaction Processing

A detailed breakup and analysis of the electronic toll collection market based on the subsystem has also been provided in the report. This includes automated vehicle identification, automated vehicle classification, violation enforcement system, and transaction processing. According to the report, automated vehicle classification accounted for the largest market share as it can classify vehicles by type and class to apply the correct toll rate. In addition, the increasing integration of automated vehicle classification systems with sensors, inductive loops, and video image processing is contributing to the growth of the respective segment.

#### Offering Insights:

- Hardware
- Back Office and Other Services

A detailed breakup and analysis of the electronic toll collection market based on the offering has also been provided in the report. This includes hardware and back office and other services. According to the report, hardware accounted for the largest market share due to the rising automation of toll collection activities around the world. In addition, the increasing integration of transponder readers, treadles, and communication systems to improve the functionalities of electronic toll collection systems is propelling the growth of the market.

#### Toll Charging Insights:

Distance Based  
Point Based  
Time Based  
Perimeter Based

A detailed breakup and analysis of the electronic toll collection market based on the toll charging has also been provided in the report. This includes distance based, point based, time based, and perimeter based. According to the report, distance based accounted for the largest market share as it provides accurate value of the distance travelled by vehicles to calculate toll charges. In addition, the rising usage of distance based toll charging systems as they charge vehicles proportionally to the use of the road and its infrastructure is bolstering the growth of the market.

Application Insights:

Highways  
Urban Areas

A detailed breakup and analysis of the electronic toll collection market based on the application has also been provided in the report. This includes highways and urban areas. According to the report, highways accounted for the largest market share as electronic toll collection systems reduce traffic congestion on highways. In addition, the rising investments in the transportation and logistics sector to develop broad lanes and highways is contributing to the growth of the respective segment.

Regional Insights:

North America  
United States  
Canada  
Asia Pacific  
China  
Japan  
India  
South Korea  
Australia  
Indonesia  
Others  
Europe

Germany  
France  
United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (the United Kingdom, Germany, France, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America (the United States and Canada) was the largest market for electronic toll collection. Some of the factors driving the North America electronic toll collection market included the growing construction of roads and highways to improve transportation and movement of vehicles, increasing number of new toll road in various states, and rising installation of technologically advanced transponders in highways, bridge, and tunnel toll booths.

#### Competitive Landscape:

The report has also provided a comprehensive analysis of the competitive landscape in the global electronic toll collection market. Some of the companies covered in the report include:

3M  
Conduent Business Services LLC  
Cubic Transportation Systems Inc.  
Efkon AG  
Kapsch Trafficcom AG  
Q-Free  
Raytheon Company  
Schneider Electric

Siemens AG  
Thales Group  
Trans Core  
Transurban Limited

Please note that this only represents a partial list of companies, and the complete list has been provided in the report.

### Key Questions Answered in This Report

1. What was the size of the global electronic toll collection market in 2022?
2. What is the expected growth rate of the global electronic toll collection market during 2023-2028?
3. What are the key factors driving the global electronic toll collection market?
4. What has been the impact of COVID-19 on the global electronic toll collection market?
5. What is the breakup of the global electronic toll collection market based on technology?
6. What is the breakup of the global electronic toll collection market based on system?
7. What is the breakup of the global electronic toll collection market based on the subsystem?
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9. What is the breakup of the global electronic toll collection market based on the toll charging?
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11. What are the key regions in the global electronic toll collection market?
12. Who are the key players/companies in the global electronic toll collection market?

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