

Global Expressway Weight-based Toll Collection System Market Growth 2026-2032

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Abstracts

The global Expressway Weight-based Toll Collection System market size is predicted to grow from US\$ 3167 million in 2025 to US\$ 5091 million in 2032; it is expected to grow at a CAGR of 7.1% from 2026 to 2032.

Expressway Weight-based Toll Collection System refers to an intelligent highway tolling and vehicle weight management system that combines vehicle weighing, axle-load measurement, vehicle classification and identification, toll calculation, transaction processing, communications, and centralized management. This report retains “Expressway Weight-based Toll Collection System” as the standardized research term. The system typically integrates dynamic or static weighing equipment, bending-plate, strain-gauge, quartz piezoelectric or other load-sensing technologies, vehicle detectors, ANPR cameras, ETC/RFID equipment, industrial computers, lane controllers, communications equipment, and tolling software. Dynamic WIM configurations can collect axle load, gross vehicle weight, axle spacing, vehicle speed, and classification data while vehicles remain in motion, supporting toll charging, overload screening, entrance control, and enforcement linkage. This study focuses on complete systems and system-level equipment deployed on expressways, including weighing modules, vehicle identification and classification, data processing, tolling or overload-control software, communications interfaces, and related system integration. The main deployment scenarios are expressway toll stations, vehicle overload control at entrances, fee calculation at exits, and related intelligent expressway applications. WIM itself also serves as an enabling technology for weight-dependent road charges and automated weight control.

Key Findings

Global sales reached approximately 18,500 systems in 2025, with an average selling price of about US\$175,000 per system

Global production capacity was approximately 23,000 systems in 2025, corresponding to an implied capacity utilization rate of about 80.4%

The industry-wide average gross margin was approximately 32.0% in 2025

Dynamic weighing and WIM-based solutions are becoming the core technology route for expressway weight monitoring and tolling

Asia-Pacific, led by China, represents the principal deployment region for new expressway intelligent weighing and tolling infrastructure

Market Trends

The market is shifting from isolated lane-based weighing equipment toward integrated “weighing+vehicle identification+tolling/enforcement+cloud management” platforms. Traditional low-speed weighing remains relevant at controlled toll plazas and inspection locations, but new projects increasingly favor dynamic WIM because it reduces vehicle stopping, supports higher traffic throughput, and can simultaneously collect axle load, gross weight, vehicle speed, axle spacing, and classification information. High-end systems are also moving toward free-flow operation by integrating WIM sensors with ANPR, LiDAR, ETC/RFID, edge computing, and lane-level vehicle matching. Commercial WIM platforms are already supporting high-speed multi-lane traffic, direct weight enforcement, and integration with third-party cameras and higher-level traffic management systems, indicating that open interfaces and multi-sensor fusion are becoming more important procurement criteria.

Market Dynamics

Drivers

Demand is primarily driven by expressway digitalization, overloaded truck control, aging road and bridge protection, toll-station automation, and the upgrading of conventional tolling infrastructure. Freight vehicles impose disproportionate pavement and bridge loads when overloaded, making accurate axle-load and gross-weight monitoring increasingly important to highway operators and transport authorities. At the same time, ETC expansion and multi-lane free-flow tolling encourage operators to integrate vehicle

identification, classification, weight information, and transaction processing into unified roadside systems. Weight-based charging also improves differentiation among commercial vehicles and enables toll policies to incorporate vehicle class, axle configuration, and actual load where regulatory frameworks permit. Existing WIM solutions are already used for infrastructure protection, commercial vehicle screening, toll-by-weight applications, and automated enforcement, supporting broader adoption of integrated weight-based toll collection.

Restraints

The main restraints are relatively high initial investment, civil-engineering requirements for road-embedded sensors, calibration and maintenance costs, and differences in measurement and enforcement regulations across countries. Measurement accuracy is affected by pavement flatness, vehicle dynamics, temperature, speed, sensor installation quality, and calibration conditions, meaning that high-speed WIM cannot be treated simply as a conventional static scale. Systems used directly for enforcement or charging generally require more stringent metrological performance, redundancy, data traceability, and certification than traffic-statistics systems. Project economics can also be constrained by lane closures during installation, lifecycle replacement of road-embedded components, and the need to integrate with legacy tolling, payment, enforcement, and back-office platforms.

Opportunities

The largest opportunities are emerging from high-speed WIM, direct enforcement, multi-lane free-flow tolling, unattended entrance overload control, bridge protection, and cross-platform highway data services. A particularly attractive direction is replacing single-purpose toll-station weighing equipment with integrated roadside perception nodes that combine WIM, ANPR, LiDAR, ETC, vehicle dimensions, axle recognition, and edge analytics. This architecture allows a single deployment to support tolling, overload screening, traffic statistics, infrastructure asset management, and enforcement, improving utilization of roadside investment. Emerging expressway networks in Asia, Latin America, the Middle East, and selected developing markets also offer greenfield opportunities, while mature markets provide retrofit opportunities around sensor replacement, digital WIM, cloud platforms, and higher-accuracy direct enforcement.

Challenges

The industry faces long-term challenges related to measurement consistency, interoperability, lifecycle maintenance, cybersecurity, legal admissibility of automatically

generated weighing evidence, and procurement fragmentation. Direct enforcement and weight-based charging require reliable matching of vehicle weight data with license plates, ETC identities, vehicle classes, and toll transactions; any mismatch can generate billing disputes or enforcement risk. Suppliers therefore compete not only on sensor accuracy but also on system uptime, algorithms, calibration stability, data integrity, open interfaces, installation capability, and after-sales service. As expressway operators increasingly demand unified platforms, standalone hardware suppliers may also face pressure to provide software, integration, remote diagnostics, and long-term maintenance capabilities.

Industry Chain Analysis

The upstream industry includes quartz crystal and piezoelectric materials, strain gauges, load cells, steel and alloy structures, embedded road frames, signal-conditioning electronics, industrial processors, cameras, LiDAR, loops and axle detectors, RFID/ETC modules, communications modules, servers, cables, cabinets, power equipment, and pavement construction materials. Sensor performance, mechanical durability, electronics reliability, and environmental protection directly influence system accuracy and lifecycle cost. In high-accuracy WIM systems, road-embedded load sensors and associated acquisition electronics represent the most technology-intensive hardware, while ANPR, vehicle classification, communications, and edge computing increasingly contribute to overall system value. Kistler, for example, integrates quartz WIM sensors, electronics and software, while VanJee combines WIM with LiDAR, ETC and intelligent roadside perception, illustrating the industry's movement from individual sensors toward integrated traffic systems.

Midstream participants develop complete weighing and tolling systems, perform hardware integration, algorithm development, lane-control design, tolling and enforcement software development, installation, calibration, commissioning, and lifecycle maintenance. The analyst dataset indicates approximately 23,000 systems of global capacity against 18,500 systems of sales in 2025, implying utilization of about 80.4%; the average gross margin was approximately 32.0%, reflecting the combined value of specialized sensing hardware, software, system engineering, installation, and maintenance rather than commodity hardware alone. Downstream customers mainly include expressway operators, toll-road concessionaires, transport investment groups, road administrations, traffic enforcement authorities, and government transport agencies. Value creation is progressively shifting from a one-time equipment sale toward integrated system delivery, software upgrades, calibration, operations support, data services, and long-term maintenance.

Segment Insights

By system type, Dynamic Weighing System and Static Weighing System should be retained as the primary Type segmentation. Dynamic systems have stronger long-term growth potential because they can measure moving vehicles and support higher throughput, while static systems remain relevant for verification, controlled inspection, and locations requiring highly stable weighing conditions. By sensing technology, Bending Plate-type Sensors, Strain-gauge Sensors, Quartz Piezoelectric Sensors, and Others form a more appropriate Technology segmentation. Quartz technology is positioned toward higher-value dynamic applications because of its response speed, durability, and suitability across broad vehicle-speed ranges; commercial quartz WIM solutions can support open-road vehicle weighing and direct enforcement, while bending-plate and load-cell architectures remain established alternatives for medium- and high-speed applications.

Detection speed should be treated as a specification dimension rather than mixed into the primary product-type classification. The proposed bands of 0–30 km/h, 30–100 km/h, and above 100 km/h are suitable for comparing low-speed controlled weighing, medium/high-speed WIM, and high-speed free-flow applications. Product differentiation increasingly depends on usable speed range, gross vehicle weight accuracy, axle-weight accuracy, lane coverage, environmental stability, vehicle matching capability, and direct-enforcement certification. For example, commercially available WIM platforms already cover traffic speeds up to approximately 130 km/h and support multi-lane operation, demonstrating that high-speed free-flow weighing has moved beyond a niche monitoring function.

Downstream Market Opportunities

Expressway toll stations remain the broadest deployment base because weighing systems can be linked directly with vehicle classification, transaction processing, and lane control. Entrance overload control offers particularly strong replacement and upgrade opportunities as authorities seek to prevent overweight trucks from entering controlled expressways rather than dealing with overloaded vehicles downstream. Exit fee calculation represents the most direct weight-based tolling scenario, where vehicle weight and class are integrated into the toll transaction. Beyond these traditional applications, future demand will increasingly come from free-flow overload screening, direct enforcement, bridge load protection, freight-corridor monitoring, virtual weigh stations, and integrated intelligent-highway platforms. Multi-purpose deployments are economically attractive because the same sensor and identification infrastructure can

support tolling, enforcement, traffic statistics, infrastructure planning, and asset protection.

Regional Insights

Asia-Pacific is the principal demand region in this study, with China playing an especially important role because of its extensive expressway network, mature ETC infrastructure, continued smart-highway investment, and large-scale freight transport demand. The regional opportunity is gradually shifting from pure expansion of toll lanes toward intelligent reconstruction of existing roads, entrance overload control, high-speed WIM, multi-sensor vehicle identification, and cloud-based tolling and enforcement management. VanJee's commercial portfolio spanning WIM, ETC, LiDAR and V2X reflects the high degree of technology convergence taking place in the Chinese intelligent-highway market.

North America and Europe represent mature but technologically advanced markets, where WIM is widely linked to commercial vehicle enforcement, traffic data collection, bridge and pavement protection, and increasingly automated tolling. Kistler reports WIM deployments across more than 50 countries, Q-Free provides high- and low-speed WIM solutions and truck tolling, and IRD offers WIM systems specifically designed for weight-based tolling and enforcement. Opportunities in mature regions therefore concentrate less on simple lane expansion and more on accuracy upgrades, direct enforcement, sensor replacement, free-flow tolling, interoperability, and data-platform integration.

Competitive Landscape Analysis

Competition is characterized by the coexistence of specialized WIM technology providers, intelligent-transportation equipment vendors, and end-to-end tolling system companies. Kistler is a major specialist in high-precision quartz WIM technology, with systems ranging from traffic statistics to certified direct weight enforcement; International Road Dynamics should be added to the core global enterprise pool because it directly supplies bending-plate, load-cell, quartz and piezoelectric WIM systems as well as the WIM@TOLL weight-based tolling solution; Intercomp is an established WIM sensor and weighing technology supplier; and VanJee Technology combines WIM equipment with ETC, LiDAR and intelligent roadside systems. Q-Free occupies a broader ITS position but has dedicated high- and low-speed WIM products together with electronic tolling and truck-tolling capabilities, while Kapsch TrafficCom and TransCore are stronger in end-to-end tolling, roadside transaction processing, vehicle identification, enforcement and back-office platforms and should therefore be

viewed primarily as integrated tolling competitors or potential system-integration participants rather than pure WIM sensor manufacturers. The competitive center of gravity is moving toward high-speed accuracy, direct-enforcement readiness, sensor durability, vehicle-data matching, open interfaces, tolling-platform integration, and lifecycle service. Chinese suppliers have advantages in localized project delivery, ETC integration and cost control, while European and North American specialists retain strengths in precision sensing, metrological certification, international project experience and mature tolling architectures.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Expressway Weight-based Toll Collection System Industry Forecast” looks at past sales and reviews total world Expressway Weight-based Toll Collection System sales in 2025, providing a comprehensive analysis by region and market sector of projected Expressway Weight-based Toll Collection System sales for 2026 through 2032. With Expressway Weight-based Toll Collection System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Expressway Weight-based Toll Collection System industry.

This Insight Report provides a comprehensive analysis of the global Expressway Weight-based Toll Collection System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Expressway Weight-based Toll Collection System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Expressway Weight-based Toll Collection System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Expressway Weight-based Toll Collection System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Expressway Weight-based Toll Collection System.

This report presents a comprehensive overview, market shares, and growth opportunities of Expressway Weight-based Toll Collection System market by product

type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Dynamic Weighing System

Static Weighing System

Segmentation by Sensor Technology:

Bending Plate-type Sensors

Strain-gauge Sensors

Quartz Piezoelectric Sensors

Others

Segmentation by Detection Speed:

Detection Speed: >100 km/h

Detection Speed: 30–100 km/h

Detection Speed: 0–30 km/h

Segmentation by Application:

Expressway Toll Station

Vehicle Overload Control at Entrance

Fee Calculation at Exit

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Inspur

Kapsch TrafficCom

Intercomp Company

Q-Free ASA

Zenmorn (Hefei) Technology

Kistler

INTETRA

Ningbo SAINTBOND Intelligent

TransCore

SAVABOON INTELLIGENT TECHNOLOGY

Pentacomp

Merhein

VanJee Technology

Shenzhen JHC Technology Development

Key Questions Addressed in this Report

What is the 10-year outlook for the global Expressway Weight-based Toll Collection System market?

What factors are driving Expressway Weight-based Toll Collection System market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Expressway Weight-based Toll Collection System market opportunities vary by end market size?

How does Expressway Weight-based Toll Collection System break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

2.1.1 Global Expressway Weight-based Toll Collection System Annual Sales 2021-2032

2.1.2 World Current & Future Analysis for Expressway Weight-based Toll Collection System by Geographic Region, 2021, 2025 & 2032

2.1.3 World Current & Future Analysis for Expressway Weight-based Toll Collection System by Country/Region, 2021, 2025 & 2032

2.2 Expressway Weight-based Toll Collection System Segment by Type

2.2.1 Dynamic Weighing System

2.2.2 Static Weighing System

2.2.3 Expressway Weight-based Toll Collection System Sales by Type

2.2.3.1 Global Expressway Weight-based Toll Collection System Sales Market Share by Type (2021-2026)

2.2.3.2 Global Expressway Weight-based Toll Collection System Revenue and Market Share by Type (2021-2026)

2.2.3.3 Global Expressway Weight-based Toll Collection System Sale Price by Type (2021-2026)

2.3 Expressway Weight-based Toll Collection System Segment by Sensor Technology

2.3.1 Bending Plate-type Sensors

2.3.2 Strain-gauge Sensors

2.3.3 Quartz Piezoelectric Sensors

2.3.4 Others

2.3.5 Expressway Weight-based Toll Collection System Sales by Sensor Technology

2.3.5.1 Global Expressway Weight-based Toll Collection System Sales Market Share

by Sensor Technology (2021-2026)

2.3.5.2 Global Expressway Weight-based Toll Collection System Revenue and Market Share by Sensor Technology (2021-2026)

2.3.5.3 Global Expressway Weight-based Toll Collection System Sale Price by Sensor Technology (2021-2026)

2.4 Expressway Weight-based Toll Collection System Segment by Detection Speed

2.4.1 Detection Speed: >100 km/h

2.4.2 Detection Speed: 30–100 km/h

2.4.3 Detection Speed: 0–30 km/h

2.4.4 Expressway Weight-based Toll Collection System Sales by Detection Speed

2.4.4.1 Global Expressway Weight-based Toll Collection System Sales Market Share by Detection Speed (2021-2026)

2.4.4.2 Global Expressway Weight-based Toll Collection System Revenue and Market Share by Detection Speed (2021-2026)

2.4.4.3 Global Expressway Weight-based Toll Collection System Sale Price by Detection Speed (2021-2026)

2.5 Expressway Weight-based Toll Collection System Segment by Application

2.5.1 Expressway Toll Station

2.5.2 Vehicle Overload Control at Entrance

2.5.3 Fee Calculation at Exit

2.5.4 Others

2.5.5 Expressway Weight-based Toll Collection System Sales by Application

2.5.5.1 Global Expressway Weight-based Toll Collection System Sale Market Share by Application (2021-2026)

2.5.5.2 Global Expressway Weight-based Toll Collection System Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global Expressway Weight-based Toll Collection System Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Expressway Weight-based Toll Collection System Breakdown Data by Company

3.1.1 Global Expressway Weight-based Toll Collection System Annual Sales by Company (2021-2026)

3.1.2 Global Expressway Weight-based Toll Collection System Sales Market Share by Company (2021-2026)

3.2 Global Expressway Weight-based Toll Collection System Annual Revenue by Company (2021-2026)

- 3.2.1 Global Expressway Weight-based Toll Collection System Revenue by Company (2021-2026)
- 3.2.2 Global Expressway Weight-based Toll Collection System Revenue Market Share by Company (2021-2026)
- 3.3 Global Expressway Weight-based Toll Collection System Sale Price by Company
- 3.4 Key Manufacturers Expressway Weight-based Toll Collection System Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Expressway Weight-based Toll Collection System Product Location Distribution
 - 3.4.2 Players Expressway Weight-based Toll Collection System Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR EXPRESSWAY WEIGHT-BASED TOLL COLLECTION SYSTEM BY GEOGRAPHIC REGION

- 4.1 World Historic Expressway Weight-based Toll Collection System Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Expressway Weight-based Toll Collection System Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Expressway Weight-based Toll Collection System Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Expressway Weight-based Toll Collection System Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Expressway Weight-based Toll Collection System Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Expressway Weight-based Toll Collection System Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Expressway Weight-based Toll Collection System Sales Growth
- 4.4 APAC Expressway Weight-based Toll Collection System Sales Growth
- 4.5 Europe Expressway Weight-based Toll Collection System Sales Growth
- 4.6 Middle East & Africa Expressway Weight-based Toll Collection System Sales Growth

5 AMERICAS

5.1 Americas Expressway Weight-based Toll Collection System Sales by Country

5.1.1 Americas Expressway Weight-based Toll Collection System Sales by Country
(2021-2026)

5.1.2 Americas Expressway Weight-based Toll Collection System Revenue by Country
(2021-2026)

5.2 Americas Expressway Weight-based Toll Collection System Sales by Type
(2021-2026)

5.3 Americas Expressway Weight-based Toll Collection System Sales by Application
(2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Expressway Weight-based Toll Collection System Sales by Region

6.1.1 APAC Expressway Weight-based Toll Collection System Sales by Region
(2021-2026)

6.1.2 APAC Expressway Weight-based Toll Collection System Revenue by Region
(2021-2026)

6.2 APAC Expressway Weight-based Toll Collection System Sales by Type
(2021-2026)

6.3 APAC Expressway Weight-based Toll Collection System Sales by Application
(2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Expressway Weight-based Toll Collection System by Country

7.1.1 Europe Expressway Weight-based Toll Collection System Sales by Country
(2021-2026)

7.1.2 Europe Expressway Weight-based Toll Collection System Revenue by Country

(2021-2026)

7.2 Europe Expressway Weight-based Toll Collection System Sales by Type

(2021-2026)

7.3 Europe Expressway Weight-based Toll Collection System Sales by Application

(2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Expressway Weight-based Toll Collection System by Country

8.1.1 Middle East & Africa Expressway Weight-based Toll Collection System Sales by Country (2021-2026)

8.1.2 Middle East & Africa Expressway Weight-based Toll Collection System Revenue by Country (2021-2026)

8.2 Middle East & Africa Expressway Weight-based Toll Collection System Sales by Type (2021-2026)

8.3 Middle East & Africa Expressway Weight-based Toll Collection System Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Expressway Weight-based Toll Collection System

10.3 Manufacturing Process Analysis of Expressway Weight-based Toll Collection System

10.4 Industry Chain Structure of Expressway Weight-based Toll Collection System

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Expressway Weight-based Toll Collection System Distributors

11.3 Expressway Weight-based Toll Collection System Customer

12 WORLD FORECAST REVIEW FOR EXPRESSWAY WEIGHT-BASED TOLL COLLECTION SYSTEM BY GEOGRAPHIC REGION

12.1 Global Expressway Weight-based Toll Collection System Market Size Forecast by Region

12.1.1 Global Expressway Weight-based Toll Collection System Forecast by Region (2027-2032)

12.1.2 Global Expressway Weight-based Toll Collection System Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Expressway Weight-based Toll Collection System Forecast by Type (2027-2032)

12.7 Global Expressway Weight-based Toll Collection System Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Inspur

13.1.1 Inspur Company Information

13.1.2 Inspur Expressway Weight-based Toll Collection System Product Portfolios and Specifications

13.1.3 Inspur Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Inspur Main Business Overview

- 13.1.5 Inspur Latest Developments
- 13.2 Kapsch TrafficCom
 - 13.2.1 Kapsch TrafficCom Company Information
 - 13.2.2 Kapsch TrafficCom Expressway Weight-based Toll Collection System Product Portfolios and Specifications
 - 13.2.3 Kapsch TrafficCom Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.2.4 Kapsch TrafficCom Main Business Overview
 - 13.2.5 Kapsch TrafficCom Latest Developments
- 13.3 Intercomp Company
 - 13.3.1 Intercomp Company Company Information
 - 13.3.2 Intercomp Company Expressway Weight-based Toll Collection System Product Portfolios and Specifications
 - 13.3.3 Intercomp Company Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 Intercomp Company Main Business Overview
 - 13.3.5 Intercomp Company Latest Developments
- 13.4 Q-Free ASA
 - 13.4.1 Q-Free ASA Company Information
 - 13.4.2 Q-Free ASA Expressway Weight-based Toll Collection System Product Portfolios and Specifications
 - 13.4.3 Q-Free ASA Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Q-Free ASA Main Business Overview
 - 13.4.5 Q-Free ASA Latest Developments
- 13.5 Zenmorn (Hefei) Technology
 - 13.5.1 Zenmorn (Hefei) Technology Company Information
 - 13.5.2 Zenmorn (Hefei) Technology Expressway Weight-based Toll Collection System Product Portfolios and Specifications
 - 13.5.3 Zenmorn (Hefei) Technology Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Zenmorn (Hefei) Technology Main Business Overview
 - 13.5.5 Zenmorn (Hefei) Technology Latest Developments
- 13.6 Kistler
 - 13.6.1 Kistler Company Information
 - 13.6.2 Kistler Expressway Weight-based Toll Collection System Product Portfolios and Specifications
 - 13.6.3 Kistler Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.6.4 Kistler Main Business Overview
- 13.6.5 Kistler Latest Developments
- 13.7 INTETRA
 - 13.7.1 INTETRA Company Information
 - 13.7.2 INTETRA Expressway Weight-based Toll Collection System Product Portfolios and Specifications
 - 13.7.3 INTETRA Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 INTETRA Main Business Overview
 - 13.7.5 INTETRA Latest Developments
- 13.8 Ningbo SAINTBOND Intelligent
 - 13.8.1 Ningbo SAINTBOND Intelligent Company Information
 - 13.8.2 Ningbo SAINTBOND Intelligent Expressway Weight-based Toll Collection System Product Portfolios and Specifications
 - 13.8.3 Ningbo SAINTBOND Intelligent Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Ningbo SAINTBOND Intelligent Main Business Overview
 - 13.8.5 Ningbo SAINTBOND Intelligent Latest Developments
- 13.9 TransCore
 - 13.9.1 TransCore Company Information
 - 13.9.2 TransCore Expressway Weight-based Toll Collection System Product Portfolios and Specifications
 - 13.9.3 TransCore Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 TransCore Main Business Overview
 - 13.9.5 TransCore Latest Developments
- 13.10 SAVABOON INTELLIGENT TECHNOLOGY
 - 13.10.1 SAVABOON INTELLIGENT TECHNOLOGY Company Information
 - 13.10.2 SAVABOON INTELLIGENT TECHNOLOGY Expressway Weight-based Toll Collection System Product Portfolios and Specifications
 - 13.10.3 SAVABOON INTELLIGENT TECHNOLOGY Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 SAVABOON INTELLIGENT TECHNOLOGY Main Business Overview
 - 13.10.5 SAVABOON INTELLIGENT TECHNOLOGY Latest Developments
- 13.11 Pentacomp
 - 13.11.1 Pentacomp Company Information
 - 13.11.2 Pentacomp Expressway Weight-based Toll Collection System Product Portfolios and Specifications
 - 13.11.3 Pentacomp Expressway Weight-based Toll Collection System Sales,

Revenue, Price and Gross Margin (2021-2026)

13.11.4 Pentacomp Main Business Overview

13.11.5 Pentacomp Latest Developments

13.12 Merhein

13.12.1 Merhein Company Information

13.12.2 Merhein Expressway Weight-based Toll Collection System Product Portfolios and Specifications

13.12.3 Merhein Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Merhein Main Business Overview

13.12.5 Merhein Latest Developments

13.13 VanJee Technology

13.13.1 VanJee Technology Company Information

13.13.2 VanJee Technology Expressway Weight-based Toll Collection System Product Portfolios and Specifications

13.13.3 VanJee Technology Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 VanJee Technology Main Business Overview

13.13.5 VanJee Technology Latest Developments

13.14 Shenzhen JHC Technology Development

13.14.1 Shenzhen JHC Technology Development Company Information

13.14.2 Shenzhen JHC Technology Development Expressway Weight-based Toll Collection System Product Portfolios and Specifications

13.14.3 Shenzhen JHC Technology Development Expressway Weight-based Toll Collection System Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Shenzhen JHC Technology Development Main Business Overview

13.14.5 Shenzhen JHC Technology Development Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Expressway Weight-based Toll Collection System Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Expressway Weight-based Toll Collection System Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Dynamic Weighing System

Table 4. Major Players of Static Weighing System

Table 5. Global Expressway Weight-based Toll Collection System Sales by Type (2021-2026) & (Units)

Table 6. Global Expressway Weight-based Toll Collection System Sales Market Share by Type (2021-2026)

Table 7. Global Expressway Weight-based Toll Collection System Revenue by Type (2021-2026) & (\$ million)

Table 8. Global Expressway Weight-based Toll Collection System Revenue Market Share by Type (2021-2026)

Table 9. Global Expressway Weight-based Toll Collection System Sale Price by Type (2021-2026) & (US\$/Unit)

Table 10. Major Players of Bending Plate-type Sensors

Table 11. Major Players of Strain-gauge Sensors

Table 12. Major Players of Quartz Piezoelectric Sensors

Table 13. Major Players of Others

Table 14. Global Expressway Weight-based Toll Collection System Sales by Sensor Technology (2021-2026) & (Units)

Table 15. Global Expressway Weight-based Toll Collection System Sales Market Share by Sensor Technology (2021-2026)

Table 16. Global Expressway Weight-based Toll Collection System Revenue by Sensor Technology (2021-2026) & (\$ million)

Table 17. Global Expressway Weight-based Toll Collection System Revenue Market Share by Sensor Technology (2021-2026)

Table 18. Global Expressway Weight-based Toll Collection System Sale Price by Sensor Technology (2021-2026) & (US\$/Unit)

Table 19. Major Players of Detection Speed: >100 km/h

Table 20. Major Players of Detection Speed: 30–100 km/h

Table 21. Major Players of Detection Speed: 0–30 km/h

Table 22. Global Expressway Weight-based Toll Collection System Sales by Detection Speed (2021-2026) & (Units)

Table 23. Global Expressway Weight-based Toll Collection System Sales Market Share by Detection Speed (2021-2026)

Table 24. Global Expressway Weight-based Toll Collection System Revenue by Detection Speed (2021-2026) & (\$ million)

Table 25. Global Expressway Weight-based Toll Collection System Revenue Market Share by Detection Speed (2021-2026)

Table 26. Global Expressway Weight-based Toll Collection System Sale Price by Detection Speed (2021-2026) & (US\$/Unit)

Table 27. Global Expressway Weight-based Toll Collection System Sale by Application (2021-2026) & (Units)

Table 28. Global Expressway Weight-based Toll Collection System Sale Market Share by Application (2021-2026)

Table 29. Global Expressway Weight-based Toll Collection System Revenue by Application (2021-2026) & (\$ million)

Table 30. Global Expressway Weight-based Toll Collection System Revenue Market Share by Application (2021-2026)

Table 31. Global Expressway Weight-based Toll Collection System Sale Price by Application (2021-2026) & (US\$/Unit)

Table 32. Global Expressway Weight-based Toll Collection System Sales by Company (2021-2026) & (Units)

Table 33. Global Expressway Weight-based Toll Collection System Sales Market Share by Company (2021-2026)

Table 34. Global Expressway Weight-based Toll Collection System Revenue by Company (2021-2026) & (\$ millions)

Table 35. Global Expressway Weight-based Toll Collection System Revenue Market Share by Company (2021-2026)

Table 36. Global Expressway Weight-based Toll Collection System Sale Price by Company (2021-2026) & (US\$/Unit)

Table 37. Key Manufacturers Expressway Weight-based Toll Collection System Producing Area Distribution and Sales Area

Table 38. Players Expressway Weight-based Toll Collection System Products Offered

Table 39. Expressway Weight-based Toll Collection System Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 40. New Products and Potential Entrants

Table 41. Market M&A Activity & Strategy

Table 42. Global Expressway Weight-based Toll Collection System Sales by Geographic Region (2021-2026) & (Units)

Table 43. Global Expressway Weight-based Toll Collection System Sales Market Share Geographic Region (2021-2026)

Table 44. Global Expressway Weight-based Toll Collection System Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 45. Global Expressway Weight-based Toll Collection System Revenue Market Share by Geographic Region (2021-2026)

Table 46. Global Expressway Weight-based Toll Collection System Sales by Country/Region (2021-2026) & (Units)

Table 47. Global Expressway Weight-based Toll Collection System Sales Market Share by Country/Region (2021-2026)

Table 48. Global Expressway Weight-based Toll Collection System Revenue by Country/Region (2021-2026) & (\$ millions)

Table 49. Global Expressway Weight-based Toll Collection System Revenue Market Share by Country/Region (2021-2026)

Table 50. Americas Expressway Weight-based Toll Collection System Sales by Country (2021-2026) & (Units)

Table 51. Americas Expressway Weight-based Toll Collection System Sales Market Share by Country (2021-2026)

Table 52. Americas Expressway Weight-based Toll Collection System Revenue by Country (2021-2026) & (\$ millions)

Table 53. Americas Expressway Weight-based Toll Collection System Sales by Type (2021-2026) & (Units)

Table 54. Americas Expressway Weight-based Toll Collection System Sales by Application (2021-2026) & (Units)

Table 55. APAC Expressway Weight-based Toll Collection System Sales by Region (2021-2026) & (Units)

Table 56. APAC Expressway Weight-based Toll Collection System Sales Market Share by Region (2021-2026)

Table 57. APAC Expressway Weight-based Toll Collection System Revenue by Region (2021-2026) & (\$ millions)

Table 58. APAC Expressway Weight-based Toll Collection System Sales by Type (2021-2026) & (Units)

Table 59. APAC Expressway Weight-based Toll Collection System Sales by Application (2021-2026) & (Units)

Table 60. Europe Expressway Weight-based Toll Collection System Sales by Country (2021-2026) & (Units)

Table 61. Europe Expressway Weight-based Toll Collection System Revenue by Country (2021-2026) & (\$ millions)

Table 62. Europe Expressway Weight-based Toll Collection System Sales by Type (2021-2026) & (Units)

Table 63. Europe Expressway Weight-based Toll Collection System Sales by

Application (2021-2026) & (Units)

Table 64. Middle East & Africa Expressway Weight-based Toll Collection System Sales by Country (2021-2026) & (Units)

Table 65. Middle East & Africa Expressway Weight-based Toll Collection System Revenue Market Share by Country (2021-2026)

Table 66. Middle East & Africa Expressway Weight-based Toll Collection System Sales by Type (2021-2026) & (Units)

Table 67. Middle East & Africa Expressway Weight-based Toll Collection System Sales by Application (2021-2026) & (Units)

Table 68. Key Market Drivers & Growth Opportunities of Expressway Weight-based Toll Collection System

Table 69. Key Market Challenges & Risks of Expressway Weight-based Toll Collection System

Table 70. Key Industry Trends of Expressway Weight-based Toll Collection System

Table 71. Expressway Weight-based Toll Collection System Raw Material

Table 72. Key Suppliers of Raw Materials

Table 73. Expressway Weight-based Toll Collection System Distributors List

Table 74. Expressway Weight-based Toll Collection System Customer List

Table 75. Global Expressway Weight-based Toll Collection System Sales Forecast by Region (2027-2032) & (Units)

Table 76. Global Expressway Weight-based Toll Collection System Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 77. Americas Expressway Weight-based Toll Collection System Sales Forecast by Country (2027-2032) & (Units)

Table 78. Americas Expressway Weight-based Toll Collection System Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 79. APAC Expressway Weight-based Toll Collection System Sales Forecast by Region (2027-2032) & (Units)

Table 80. APAC Expressway Weight-based Toll Collection System Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 81. Europe Expressway Weight-based Toll Collection System Sales Forecast by Country (2027-2032) & (Units)

Table 82. Europe Expressway Weight-based Toll Collection System Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. Middle East & Africa Expressway Weight-based Toll Collection System Sales Forecast by Country (2027-2032) & (Units)

Table 84. Middle East & Africa Expressway Weight-based Toll Collection System Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Global Expressway Weight-based Toll Collection System Sales Forecast by

Type (2027-2032) & (Units)

Table 86. Global Expressway Weight-based Toll Collection System Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 87. Global Expressway Weight-based Toll Collection System Sales Forecast by Application (2027-2032) & (Units)

Table 88. Global Expressway Weight-based Toll Collection System Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 89. Inspur Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 90. Inspur Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 91. Inspur Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 92. Inspur Main Business

Table 93. Inspur Latest Developments

Table 94. Kapsch TrafficCom Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 95. Kapsch TrafficCom Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 96. Kapsch TrafficCom Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 97. Kapsch TrafficCom Main Business

Table 98. Kapsch TrafficCom Latest Developments

Table 99. Intercomp Company Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 100. Intercomp Company Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 101. Intercomp Company Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 102. Intercomp Company Main Business

Table 103. Intercomp Company Latest Developments

Table 104. Q-Free ASA Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 105. Q-Free ASA Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 106. Q-Free ASA Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 107. Q-Free ASA Main Business

Table 108. Q-Free ASA Latest Developments

Table 109. Zenmorn (Hefei) Technology Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 110. Zenmorn (Hefei) Technology Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 111. Zenmorn (Hefei) Technology Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 112. Zenmorn (Hefei) Technology Main Business

Table 113. Zenmorn (Hefei) Technology Latest Developments

Table 114. Kistler Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 115. Kistler Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 116. Kistler Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 117. Kistler Main Business

Table 118. Kistler Latest Developments

Table 119. INTETRA Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 120. INTETRA Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 121. INTETRA Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 122. INTETRA Main Business

Table 123. INTETRA Latest Developments

Table 124. Ningbo SAINTBOND Intelligent Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 125. Ningbo SAINTBOND Intelligent Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 126. Ningbo SAINTBOND Intelligent Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 127. Ningbo SAINTBOND Intelligent Main Business

Table 128. Ningbo SAINTBOND Intelligent Latest Developments

Table 129. TransCore Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 130. TransCore Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 131. TransCore Expressway Weight-based Toll Collection System Sales (Units),

Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 132. TransCore Main Business

Table 133. TransCore Latest Developments

Table 134. SAVABOON INTELLIGENT TECHNOLOGY Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 135. SAVABOON INTELLIGENT TECHNOLOGY Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 136. SAVABOON INTELLIGENT TECHNOLOGY Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 137. SAVABOON INTELLIGENT TECHNOLOGY Main Business

Table 138. SAVABOON INTELLIGENT TECHNOLOGY Latest Developments

Table 139. Pentacomp Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 140. Pentacomp Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 141. Pentacomp Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 142. Pentacomp Main Business

Table 143. Pentacomp Latest Developments

Table 144. Merhein Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 145. Merhein Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 146. Merhein Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 147. Merhein Main Business

Table 148. Merhein Latest Developments

Table 149. VanJee Technology Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its Competitors

Table 150. VanJee Technology Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 151. VanJee Technology Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 152. VanJee Technology Main Business

Table 153. VanJee Technology Latest Developments

Table 154. Shenzhen JHC Technology Development Basic Information, Expressway Weight-based Toll Collection System Manufacturing Base, Sales Area and Its

Competitors

Table 155. Shenzhen JHC Technology Development Expressway Weight-based Toll Collection System Product Portfolios and Specifications

Table 156. Shenzhen JHC Technology Development Expressway Weight-based Toll Collection System Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 157. Shenzhen JHC Technology Development Main Business

Table 158. Shenzhen JHC Technology Development Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Expressway Weight-based Toll Collection System

Figure 2. Expressway Weight-based Toll Collection System Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Expressway Weight-based Toll Collection System Sales Growth Rate 2021-2032 (Units)

Figure 7. Global Expressway Weight-based Toll Collection System Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Expressway Weight-based Toll Collection System Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Expressway Weight-based Toll Collection System Sales Market Share by Country/Region (2025)

Figure 10. Expressway Weight-based Toll Collection System Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Dynamic Weighing System

Figure 12. Product Picture of Static Weighing System

Figure 13. Global Expressway Weight-based Toll Collection System Sales Market Share by Type in 2026

Figure 14. Global Expressway Weight-based Toll Collection System Revenue Market Share by Type (2021-2026)

Figure 15. Product Picture of Bending Plate-type Sensors

Figure 16. Product Picture of Strain-gauge Sensors

Figure 17. Product Picture of Quartz Piezoelectric Sensors

Figure 18. Product Picture of Others

Figure 19. Global Expressway Weight-based Toll Collection System Sales Market Share by Sensor Technology in 2026

Figure 20. Global Expressway Weight-based Toll Collection System Revenue Market Share by Sensor Technology (2021-2026)

Figure 21. Product Picture of Detection Speed: >100 km/h

Figure 22. Product Picture of Detection Speed: 30–100 km/h

Figure 23. Product Picture of Detection Speed: 0–30 km/h

Figure 24. Global Expressway Weight-based Toll Collection System Sales Market Share by Detection Speed in 2026

Figure 25. Global Expressway Weight-based Toll Collection System Revenue Market

Share by Detection Speed (2021-2026)

Figure 26. Expressway Weight-based Toll Collection System Consumed in Expressway Toll Station

Figure 27. Global Expressway Weight-based Toll Collection System Market: Expressway Toll Station (2021-2026) & (Units)

Figure 28. Expressway Weight-based Toll Collection System Consumed in Vehicle Overload Control at Entrance

Figure 29. Global Expressway Weight-based Toll Collection System Market: Vehicle Overload Control at Entrance (2021-2026) & (Units)

Figure 30. Expressway Weight-based Toll Collection System Consumed in Fee Calculation at Exit

Figure 31. Global Expressway Weight-based Toll Collection System Market: Fee Calculation at Exit (2021-2026) & (Units)

Figure 32. Expressway Weight-based Toll Collection System Consumed in Others

Figure 33. Global Expressway Weight-based Toll Collection System Market: Others (2021-2026) & (Units)

Figure 34. Global Expressway Weight-based Toll Collection System Sale Market Share by Application (2025)

Figure 35. Global Expressway Weight-based Toll Collection System Revenue Market Share by Application in 2025

Figure 36. Expressway Weight-based Toll Collection System Sales by Company in 2025 (Units)

Figure 37. Global Expressway Weight-based Toll Collection System Sales Market Share by Company in 2025

Figure 38. Expressway Weight-based Toll Collection System Revenue by Company in 2025 (\$ millions)

Figure 39. Global Expressway Weight-based Toll Collection System Revenue Market Share by Company in 2025

Figure 40. Global Expressway Weight-based Toll Collection System Sales Market Share by Geographic Region (2021-2026)

Figure 41. Global Expressway Weight-based Toll Collection System Revenue Market Share by Geographic Region in 2025

Figure 42. Americas Expressway Weight-based Toll Collection System Sales 2021-2026 (Units)

Figure 43. Americas Expressway Weight-based Toll Collection System Revenue 2021-2026 (\$ millions)

Figure 44. APAC Expressway Weight-based Toll Collection System Sales 2021-2026 (Units)

Figure 45. APAC Expressway Weight-based Toll Collection System Revenue

2021-2026 (\$ millions)

Figure 46. Europe Expressway Weight-based Toll Collection System Sales 2021-2026 (Units)

Figure 47. Europe Expressway Weight-based Toll Collection System Revenue 2021-2026 (\$ millions)

Figure 48. Middle East & Africa Expressway Weight-based Toll Collection System Sales 2021-2026 (Units)

Figure 49. Middle East & Africa Expressway Weight-based Toll Collection System Revenue 2021-2026 (\$ millions)

Figure 50. Americas Expressway Weight-based Toll Collection System Sales Market Share by Country in 2025

Figure 51. Americas Expressway Weight-based Toll Collection System Revenue Market Share by Country (2021-2026)

Figure 52. Americas Expressway Weight-based Toll Collection System Sales Market Share by Type (2021-2026)

Figure 53. Americas Expressway Weight-based Toll Collection System Sales Market Share by Application (2021-2026)

Figure 54. United States Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 55. Canada Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 56. Mexico Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 57. Brazil Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 58. APAC Expressway Weight-based Toll Collection System Sales Market Share by Region in 2025

Figure 59. APAC Expressway Weight-based Toll Collection System Revenue Market Share by Region (2021-2026)

Figure 60. APAC Expressway Weight-based Toll Collection System Sales Market Share by Type (2021-2026)

Figure 61. APAC Expressway Weight-based Toll Collection System Sales Market Share by Application (2021-2026)

Figure 62. China Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 63. Japan Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 64. South Korea Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 65. Southeast Asia Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 66. India Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 67. Australia Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 68. China Taiwan Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 69. Europe Expressway Weight-based Toll Collection System Sales Market Share by Country in 2025

Figure 70. Europe Expressway Weight-based Toll Collection System Revenue Market Share by Country (2021-2026)

Figure 71. Europe Expressway Weight-based Toll Collection System Sales Market Share by Type (2021-2026)

Figure 72. Europe Expressway Weight-based Toll Collection System Sales Market Share by Application (2021-2026)

Figure 73. Germany Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 74. France Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 75. UK Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 76. Italy Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 77. Russia Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 78. Middle East & Africa Expressway Weight-based Toll Collection System Sales Market Share by Country (2021-2026)

Figure 79. Middle East & Africa Expressway Weight-based Toll Collection System Sales Market Share by Type (2021-2026)

Figure 80. Middle East & Africa Expressway Weight-based Toll Collection System Sales Market Share by Application (2021-2026)

Figure 81. Egypt Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 82. South Africa Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 83. Israel Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 84. Turkey Expressway Weight-based Toll Collection System Revenue Growth

2021-2026 (\$ millions)

Figure 85. GCC Countries Expressway Weight-based Toll Collection System Revenue Growth 2021-2026 (\$ millions)

Figure 86. Manufacturing Cost Structure Analysis of Expressway Weight-based Toll Collection System in 2026

Figure 87. Manufacturing Process Analysis of Expressway Weight-based Toll Collection System

Figure 88. Industry Chain Structure of Expressway Weight-based Toll Collection System

Figure 89. Channels of Distribution

Figure 90. Global Expressway Weight-based Toll Collection System Sales Market Forecast by Region (2027-2032)

Figure 91. Global Expressway Weight-based Toll Collection System Revenue Market Share Forecast by Region (2027-2032)

Figure 92. Global Expressway Weight-based Toll Collection System Sales Market Share Forecast by Type (2027-2032)

Figure 93. Global Expressway Weight-based Toll Collection System Revenue Market Share Forecast by Type (2027-2032)

Figure 94. Global Expressway Weight-based Toll Collection System Sales Market Share Forecast by Application (2027-2032)

Figure 95. Global Expressway Weight-based Toll Collection System Revenue Market Share Forecast by Application (2027-2032)

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