

Electronic Toll Collection Market by Technology (RFID and DSRC), Offering (Hardware and Back Office), Application (Highways and Urban Areas), Type (Transponders/Tag-Based Tolling Systems) and Region - Global Forecast to 2029

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Abstracts

The global electronic toll collection market was valued at USD 10.1 billion in 2024 and is projected to reach USD 14.7 billion by 2029; it is expected to register a CAGR of 7.9% during the forecast period. Technological advancements in transportation infrastructure is driving the growth of the electronic toll collection market. Whereas overreliance of ETC on technology and susceptibility to technical failure is restraining the growth of the electronic toll collection market.

“The RFID segment is expected to grow at the second higher CAGR during the forecast period.”

The RFID segment is expected to grow at a second higher CAGR of 8.0% during the forecast period. RFID technology utilizes radio-frequency electromagnetic fields to identify objects that carry RFID tags. This technology is used for electronic identification, tracking, and storing information on a tag. Two-way radio transmitters/receivers, also called interrogators or readers, send a signal to the tag and read its response. RFID readers scan the tag and send the information to the database for storage. RFID is a prominent electronic toll collection technology due to its low operational cost. RFID's ability to support interoperability fosters seamless toll transactions across various toll booths and regions, contributing to user convenience. The integration of RFID systems with backend operations allows for real-time monitoring and efficient data management, providing insights into traffic patterns and revenue collection.

The hardware offering segment is likely to grow at the second higher CAGR during the forecast period

The hardware segment is expected to grow at a CAGR of 7.0% during the forecast period. Electronic Toll collection (ETC) hardware systems have shown to increase revenue collection by reducing leakage and improving accuracy in toll transactions. This makes them an attractive option for toll operators and government agencies looking to maximize toll revenue. The support and mandates from government authorities to implement ETC systems can significantly boost their adoption. Governments may also promote the use of electronic toll collection to improve overall transportation efficiency and reduce traffic congestion.

“The RoW segment is likely to grow at the second highest CAGR during the forecast period.”

The market in RoW is expected to witness the second highest CAGR of 8.0% during the forecast period. Many countries in the Middle East and Africa are investing heavily in infrastructure development, including the construction and maintenance of roads and highways. Toll collection systems provide a means to generate revenue for these projects while ensuring their proper upkeep. Governments in the Middle East and Africa are implementing initiatives to modernize transportation systems. Regulatory support and mandates for the adoption of electronic toll collection can further drive the growth of these systems

Breakdown of primaries

The study contains insights from various industry experts, ranging 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%, Tier 3 – 20%

By Designation— C-level Executives - 40%, Directors - 30%, Others - 30%

By Region—North America - 40%, Europe - 30%, Asia Pacific - 20%, RoW - 10%

The electronic toll collection market is dominated by a few globally established players such as Kapsch TrafficCom AG (Austria); Conduent, Inc. (US); TransCore (US); Thales (France); Cubic Corporation (US); Infineon Technologies AG (Germany); Siemens

(Germany); EFKON GmbH (Austria); Neology, Inc. (US); FEIG ELECTRONIC (Germany). The study includes an in-depth competitive analysis of these key players in the electronic toll collection market, with their company profiles, recent developments, and key market strategies.

Research Coverage:

The report segments the electronic toll collection market and forecasts its size by offering, type, panel size, location, vertical, and region. The report also discusses the drivers, restraints, opportunities, and challenges pertaining to the market. It gives a detailed view of the market across four main regions—North America, Europe, Asia Pacific, and RoW. Supply chain analysis has been included in the report, along with the key players and their competitive analysis in the electronic toll collection ecosystem.

Key Benefits to Buy the Report:

Analysis of key drivers (Urgent need to mitigate traffic congestion and reduce road accidents, Strong government support through funding and investment in deployment of advanced tolling solutions). Restraint (Overreliance of ETC on technology and susceptibility to technical failure, ETC implementation constraints in developing countries), Opportunity (Significant focus on minimizing fuel consumption and emissions for economic and environmental gains, Integration of blockchain technology into toll collection systems), Challenges (Data privacy concerns, Interoperability issues associated with tolling systems)

Product Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and new product launches in the electronic toll collection market.

Market Development: Comprehensive information about lucrative markets – the report analyses the electronic toll collection market across varied regions

Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the electronic toll collection market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Kapsch TrafficCom AG

(Austria); Conduent, Inc. (US); TransCore (US); Thales (France); Cubic Corporation (US); Infineon Technologies AG (Germany); Siemens (Germany); EFKON GmbH (Austria); Neology, Inc. (US); FEIG ELECTRONIC (Germany)) among others in the electronic toll collection market.

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*Details on Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.

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About

Electronic Toll Collection (E-Toll) system aims to eliminate the delay on toll roads by collecting tolls electronically. ETC system determines whether the vehicles passing are enrolled in the program or not. It alerts enforcers of vehicles which are not enrolled, and electronically debits the accounts of registered car owners, without requiring them to stop. There are many players involved in this market; such as Kapsch TrafficCom (Austria), Q-Free (Norway), 3M (U.S.), EFKON AG (U.S.), Ascendi Group (Portugal), and so on. The most revolutionary application of ETC is in the urban context of congested cities, wherein it facilitates the tolls charging, without having the vehicles to slow down or stop.

This report describes the various components of ETC system such as Automatic Vehicle Identification (AVI), Automatic Vehicle Classification (AVC), Violation/Video Enforcement System (VES), Back office and Integration. This report also covers the major applications of the ETC system on the basis of the different areas of usage; such as highway, and urban. There are various technologies which are included in this study of electronic toll control system. The global ETC system market is divided on the basis of four technologies, namely the RFID based ETC system, DSRC based ETC system, Video Analytics based ETC system, and GNSS/GPS based ETC system. Furthermore, deep segmentation of all the sections is also provided in the report.

Electronic Toll Collection system market is driven by various drivers; such as the need for congestion free toll transactions, improved traffic control, and the need to save travel time.

Although these drivers are driving the needs of the ETC system, this system is yet to be implemented on a strong basis in many of the developing countries such as India.

This report classifies the overall market into four major geographical segments, namely North America, Europe, APAC, and ROW. All the four major regions are further segmented on the basis of the major countries. North America, currently, is the market leader in the overall ETC System market; followed by Europe and APAC. In ROW— The Middle East and Africa have been the largest contributors, off late. ETC system is an emerging technology, which has been gaining the investors' interest due to its high efficiency and accuracy.

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