

Europe Trace Detection - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Europe Trace Detection Market size is estimated at USD 610 million in 2024, and is expected to reach USD 860 million by 2029, growing at a CAGR of 7.60% during the forecast period (2024-2029).

Key Highlights

With the rising terror attack threats at various public gatherings, trace detection plays a vital role, especially for places like government organizations, concerts, schools, transportation, and many others, to help reduce and mitigate associated risk factors.

Trace detectors can identify deficient levels of substances, like chemicals, drugs, explosives, or trace elements, in various samples. They are employed in multiple applications like security, forensics, and industrial processes. Many trace detectors operate non-destructively. They can also be highly selective in detecting specific substances, allowing for targeted analysis and identification. The increasing use of trace detectors in the military and defense sector, owing to their ability to detect hidden explosives like bombs, improvised explosive devices, and chemical warfare agents, is anticipated to drive the market's growth significantly.

In civil security, explosives have been detected mainly by stationary stand-alone devices, such as at airport security gates. The portable devices currently available on the market, weighing an average of five kilograms, are suitable only for a few mobile applications. Additionally, the maintenance and cleaning of these devices are very cost-intensive.

To tackle the issue, in May 2023, a team of founders from the Federal Institute for Materials Research and Testing announced that they were striving to develop a mobile explosives trace detector market that detects explosives more reliably, making an essential contribution to security in the civil sector.

However, explosive trace detectors have varying sensitivity levels and may not detect trace amounts of explosives. Also, the sampling techniques can influence the detectors' effectiveness. Proper sampling and collection of trace samples are crucial for accurate results. Inadequate sampling may lead to false negatives or false positives. Moreover, failure to calibrate or maintain the equipment can affect its accuracy and reliability. These factors may restrain the growth of the market.

Further, implementing and maintaining trace detection systems can be costly, especially for organizations with limited budgets. The high cost of acquiring and operating screening systems can be expensive. Also, regular training and employing skilled personnel can significantly restrain the market.

Moreover, the conflict between Russia and Ukraine will significantly impact the industry. The conflict has already exacerbated the semiconductor supply chain issues, and the chip shortage has affected the industry for some time. The disruption may result in volatile pricing for critical raw materials such as nickel, palladium, copper, titanium, aluminum, and iron ore, resulting in material shortages. This, in turn, could impact manufacturing of various trace detection equipment. Further, according to UkraineInvest, copper prices escalated to USD 10,845/mt in early March 2022. The ongoing war between Russia and Ukraine, high energy costs, and stricter emissions standards in Europe have been noted as the primary reasons for the continued shortage of copper.

Europe Trace Detection Market Trends

The Law Enforcement Segment is Anticipated to Drive the Market Demand

In law enforcement, trace detectors detect and identify narcotics and drugs in various forms, including powders, liquids, and solids. Law enforcement agencies utilize trace detectors to identify illegal substances during searches and investigations.

Further, trace detectors are used to identify explosive materials and residue. They can also detect and identify dangerous chemicals and hazardous materials, including toxic substances and illicit drugs. This helps law enforcement agencies respond to hazardous

material incidents and protect public safety.

Trace detectors can identify and analyze gunshot residue (GSR) on individuals and surfaces. This helps law enforcement agencies determine if a firearm has been discharged and provides valuable evidence in criminal investigations.

According to the House of Commons, in 2023, there were 83,128 men and 3,259 women in prisons in England and Wales in 2023. Compared with the previous year, this represented an increase for both males and females.

According to GOV.UK, the United Kingdom spent approximately GBP 6.09 billion (USD 7.80 billion) on its prison system in 2022/23, an increase from GBP 5.42 billion (USD 6.94 billion) in 2021/22. The increasing government spending on prison systems in Europe is anticipated to boost the market's growth significantly.

The United Kingdom is Anticipated to Register Robust Market Growth Rate

Security concerns have been a significant issue in the United Kingdom. Governments and private enterprises are investing massive amounts of money in security owing to several security threats in the region. Security checks and surveillance have been an area of concern in government buildings like Courthouses, embassies, Parliament houses, government banks, libraries, and other security-critical places with a potential risk of terrorist attacks.

Government agencies in the United Kingdom widely use trace detection technology to detect trace amounts of explosives in airports, government buildings, public transportation systems, etc.

Trace detectors are commonly used to detect traces of explosives on passengers, luggage, and cargo at airports and border checkpoints. They help identify potential threats and enhance security. They can also detect contraband items like illicit substances, weapons, or prohibited items that may be concealed on individuals or within their belongings.

The increase in air traffic in the United Kingdom is anticipated to boost the development of the market. For instance, according to the Civil Aviation Authority (UK), Heathrow was the busiest airport in the United Kingdom in 2023, handling roughly 79.2 million

passengers, more than Gatwick and Stansted combined.

According to the GOV.UK, in 2022/23, the United Kingdom spent approximately GBP 55.5 billion (USD 71.05 billion) on defense, compared to GBP 51.9 billion (USD 66.44 billion) in the previous year. In the 2022/23 financial year, the Government of the United Kingdom spent approximately GBP 50.4 billion (USD 64.52 billion) on military defense, which was by far the highest category of defense spending, followed by GBP 2.61 billion (USD 3.34 billion) on foreign military aid. The robust military and defense spending in the United Kingdom is likely to accelerate the development of the market.

Europe Trace Detection Industry Overview

The European trace detection market is semi-consolidated, with significant players like Smiths Detection Group, Leidos Holdings, Inc., Teledyne Flir LLC, Bruker Corporation, etc. The market players are innovating advanced products and processes to cater to consumers' needs through extensive investment in R&D, product launches, and collaborations.

August 2023 - OSI Systems Inc. announced that its Rapiscan Itemiser 5X Explosive Trace Detection device met the TSA's qualification standards for inclusion on the Air Cargo Screening Technology List.

January 2023 - Rapiscan Systems Inc. announced that it acquired all assets of VOTI Detection Inc. According to Rapiscan, the Rapiscan Global Service has a significant global reach and over 350 service professionals, which is expected to deliver a more streamlined and premium experience than the one customers have enjoyed over the years from VOTI Detection.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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