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Middle East And Africa Trace Detection - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Middle East And Africa Trace Detection Market size is estimated at USD 0.07 billion in 2024, and is expected to reach USD 0.09 billion by 2029, growing at a CAGR of 6.62% 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 detect and identify extremely low levels of substances, like drugs, chemicals, explosives, or trace elements, in various samples. They are employed in numerous applications like law enforcement, forensics, security, industrial processes, etc. 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, chemical warfare agents, etc., is anticipated to drive the growth of the market significantly.

Trace detection enables assurance from a threat by using various technologies, such as chemiluminescence, amplifying fluorescent polymer, thermo-redox, mass spectrometry, ion mobility spectrometry, automated colorimetric, etc., that are becoming very popular at security checkpoints for expediting the process.

The increasing gun violence is likely to increase the adoption of trace detectors in the

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region. For instance, in June 2023, a few gunmen burst into a room at a men's hostel near the eastern South African city of Durban, killing eight people and leaving two others injured. In January 2023, eight people were killed and three others wounded when gunmen opened fire at a birthday party in South Africa's Eastern Cape province.

In the civil security sector, explosives have been detected mainly by stationary stand-alone devices, such as at airport security gates. The maintenance and cleaning of these devices are very cost-intensive. As a result, portable trace detectors are rapidly gaining popularity in the region. They are designed to operate on battery power, eliminating the need for a constant external power source. This feature makes them suitable for use in remote locations or areas with limited access to electricity. The battery-operated nature of these detectors enhances their mobility and usability. They are user-friendly and offer rapid screening.

However, explosive trace detectors have varying levels of sensitivity and may not detect trace amounts of explosives. The effectiveness of the detectors can also be influenced by the sampling techniques used. 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.

Furthermore, the implementation and maintenance of trace detection systems can be costly, especially for organizations with limited budgets. The high cost of acquiring and operating screening systems can be costly. Thus, conducting regular training and employing skilled personnel can pose a significant restraint. Additionally, the conflict between Russia and Ukraine is expected to impact the electronics industry significantly. The conflict has already exacerbated the semiconductor supply chain issues and the chip shortage that have 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 the manufacturing of various trace detection equipment.

Middle East And Africa Trace Detection Market Trends

Law Enforcement Segment Anticipated to Drive Market Demand

In the law enforcement sector, trace detectors are employed to detect and identify narcotics and drugs in various forms, including liquids, powders, and solids. Law enforcement agencies employ trace detectors to identify illegal substances during

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searches and investigations.

Furthermore, trace detectors are utilized to identify explosive materials and residue. They can also detect dangerous chemicals and hazardous materials, including illicit drugs and toxic substances. This facilitates law enforcement agencies' response to hazardous materials incidents and protects public safety.

Trace detectors can be used to 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.

The increasing prison population in the Middle East and Africa is likely to augment the demand for trace detection during the forecast period. According to Numbeo, in 2024, South Africa had a crime index of 75.4, that slightly got decreased from 75.5 in 2023.

Moreover, according to the Global Initiative Against Transnational Organized Crime, the synthetic drug trade was the most prevalent criminal market in South Africa in 2023, obtaining 8.5 index points. At a regional level, Southern Africa scored the highest index for fauna crimes, with South Africa being one of the main contributors.

Saudi Arabia Projected to Register Robust Growth

Trace detection technology is widely used by government agencies in Saudi Arabia 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 Saudi Arabia is anticipated to boost the development of the market. For instance, according to the General Authority of Civil Aviation, passenger traffic in Saudi Arabia reached a new record of about 112 million in 2023, growing 26% year-on-year (YoY) and more than 8% compared to 2019. Air cargo transportation at Saudi airports increased by more than 7%, reaching about 918,000 tons in 2023, compared to 854,000 tons in 2022.

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Moreover, according to the General Authority for Statistics (Saudi Arabia), the forecasted revenue from air transport in Saudi Arabia is projected to amount to approximately USD 14.8 billion by 2024, an increase from USD 14.6 billion in 2023.

Trace detection systems are widely deployed in the military and defense sectors to detect and identify drugs. This is important for security operations, as it helps prevent the smuggling of illegal drugs. They can also identify drug production facilities and detect chemical warfare agents. This is crucial in military operations, as it helps protect military personnel from exposure to hazardous substances.

According to SIPRI, Saudi Arabia's military expenditures increased to USD 75,813.30 million in 2023 from USD 70,920 million in 2022. The region's robust military spending is likely to offer lucrative opportunities for the market's growth.

Middle East And Africa Trace Detection Industry Overview

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

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.

March 2023: Rapiscan Systems launched the 935DX, a new model within its growing line of ORION X-ray screening systems. The 935DX, among the largest tunneled conveyor systems on the market, is primarily designed for screening air cargo and pallets.

Additional Benefits:

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