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Electronic Toll Collection Market Size and Forecasts (2020 - 2030), Global and Regional Share, Trends, and Growth Opportunity Analysis By Offering (Systems and Services); Technology (RFID, DSRC, ANPR, GNSS, and Others), and Application (Highways and Urban Zones)

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Abstracts

The Electronic Toll Collection System Market size is expected to reach US$ 14.36 billion by 2030 from 5.54 billion in 2022, at an estimated CAGR of 12.6% from 2022 to 2030.

The North American Electronic Toll Collection System market is segmented into the US, Canada, and Mexico. The US is estimated to hold the largest Electronic Toll Collection System market share during the forecast period. The electronic toll collection system market in North America is segmented into the US, Canada, and Mexico. The US is one of the first countries to integrate solutions in electronic toll collection system market and boasts a significant network of electronic toll collection system (ETC) based systems across various tunnels, bridges, toll gateways, and expressways. Moreover, a collaborative effort of various inter-state agencies facilitated the implementation of an efficient ETC system across the region in the past decade. The significant freight transportation by road in the US compared to Canada and Mexico has also greatly influenced the adoption of ETC-based systems in the region.

According to the intelligent transportation systems joint program office, in September 2019, in Florida, all-ETC systems and hybrid toll plazas that support open road tolling experienced 73 to 45% fewer crashes than traditional toll plazas, respectively. An increasing number of government initiatives to achieve congestion-free transportation,

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rising vehicle demand and production in North America, and growing adoption of the latest technological solutions—such as GPS and GNSS toll collection and tracking solutions. Further, in June 2022, TransCore was awarded a contract by the Thousand Islands Bridge Authority to develop, construct, and maintain next-generation toll collection systems. Its international bridge connected Wellesley Island with Hill Island in New York. TransCore replaced the previous technology used by TIBA. Thus, such instances are driving the North America electronic toll collection market.

The North American Free Trade Agreement (NAFTA) has ensured transportation and free trade within the US, Canada, and Mexico. The consistent maintenance and connectivity through roads have also raised the demand for robust toll collection across Mexico and Canada. Moreover, owing to the growing infrastructure demand and surge in the number of registered vehicles in the country, the demand for the ETC system will rise to handle road congestion efficiently. According to the Bureau of Transportation Statistics, the US total vehicle production, including passenger cars and commercial vehicles, increased from 8.8 million units in 2020 to 9.1 million units in 2021. The total domestic sales in the US, including passenger cars and commercial vehicles, increased from 11.5 million units in 2020 to 11.8 million units in 2021. Also, the trend of shifting from barrier-based ETC to open road tolling (ORT) or free-flow tolling has been increasingly growing in the road tolling industry, especially in North America, as the countries in the region are facing high traffic congestion at toll roads.

Based on technology, the Electronic Toll Collection System market is segmented into RFID, DSRC, GNSS, ANPR, and others. The RFID segment held the largest share in the Electronic Toll Collection System market in 2022. Radiofrequency identification RFID communication is also a mature technology for bi-directional data transfer between vehicles and roadsides. The main elements of RFID technology are the RFID tag (also called sticker-tag) with read/write capabilities and the RFID reader to be installed in lanes, segments, entrances, or exits, depending on the policy and tariff of the system. Thus, road network modifications must also be 'acted in the roadside infrastructure. RFID tags are known to be very cost-effective since the cost is at or below US$ 1.05. In addition, RFID tags need no batteries. Also, RFID readers are very cost-effective. RFID technology offers many other applications, allows easier integration, and lowers capital investment and operational costs. The RFID Readers mounted at toll booths read the prepaid RFID tags fixed on vehicles' windshields, and automatically, the respective amount will be deducted. Therefore, the electronic toll collection system market is growing significantly with the increasing demand for RFID.

Based on offering, the Electronic Toll Collection System market is segmented into

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systems and services. The systems segment held the largest share in the Electronic Toll Collection System market. The solutions in electronic toll collection system market constitutes hardware and software installed across different infrastructures over expressways, bridges, tunnels, onboard vehicles, and toll gateways. The hardware equipment includes lane hardware and toll station hardware. Lane hardware mainly consists of roadside antenna units, high-speed electric barriers, toll lane controllers, ETC lane signal lights, lane traffic lights, multifunction displays for toll collection, lane surveillance cameras, vehicle detectors, switches, computer networks, etc. Toll station hardware mainly contains switches, workstations, and ETC toll servers. ETC systems generally consist of hardware equipment such as transponders, antenna units, signal receivers, toll servers, optical sensors, in-road sensors, overhead cameras, roadside communication units, and tag readers. Two aspects of hardware equipment—one installed at the toll gateways and the other one onboard the vehicle—need to work cohesively for the ETC system to function efficiently. This equipment is responsible for gathering input data points for the software and algorithms to work upon to segregate relevant and nonrelevant data followed by identification and transaction related to toll. Moreover, based on the gathered data, the system can engage with necessary enforcement or alert the appropriate authority as per the system design. Also, the solutions provider ensures the availability of onboard vehicle tags at the local convenience store, registration of new user accounts, and related back-office support for the error-free functioning of the ETC system. The software helps with data acquisition and data communication. It also helps increase operational efficiencies for the toll collection system.

Conduent Business Services, LLC., Efkon GmbH, Kapsch TrafficCom AG, Thales, Toshiba Corporation, TransCore, FAAC S.p.A., Mitsubishi Heavy Industries, LTD., SICE, and P Square Solutions are among the key Electronic Toll Collection System Market players that are profiled in this market study.

The overall Electronic Toll Collection System Market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the Electronic Toll Collection System Market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the Electronic Toll Collection

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System Market.

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Contents

1. INTRODUCTION

1.1 The Insight Partners Research Report Guidance
1.2 Market Segmentation

2. EXECUTIVE SUMMARY

2.1 Key Insights
2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

3.1 Coverage
3.2 Secondary Research
3.3 Primary Research

4. ELECTRONIC TOLL COLLECTION MARKET LANDSCAPE

4.1 Overview
4.2 PEST Analysis
4.3 Ecosystem Analysis
  4.3.1 List of Vendors in Value Chain

5. ELECTRONIC TOLL COLLECTION MARKET - KEY INDUSTRY DYNAMICS

5.1 Electronic Toll Collection Market - Key Industry Dynamics
5.2 Market Drivers
  5.2.1 Long-Term Economic and Safety Benefits
  5.2.2 Increasing Demand for Interoperable Electronic Tolling Systems
  5.2.3 Government Focus on Transportation Infrastructure
5.3 Market Restraints
  5.3.1 Leakage and High CapEx and OpEx Costs
  5.3.2 Lack of Standardization and Evaluation Metrics for ETC Systems
5.4 Market Opportunities
  5.4.1 Surging Demand for Effective Traffic Management at Toll Plaza
  5.4.2 Deployment of Blockchain Technology
5.5 Future Trends

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5.5.1 Satellite-Based GPS/GNSS Systems
5.6 Impact of Drivers and Restraints:

6. ELECTRONIC TOLL COLLECTION MARKET - GLOBAL MARKET ANALYSIS

6.1 Electronic Toll Collection Market Revenue (US$ Million), 2022 – 2030
6.2 Electronic Toll Collection Market Forecast and Analysis

7. ELECTRONIC TOLL COLLECTION MARKET ANALYSIS - OFFERING

7.1 Systems
7.1.1 Overview
7.1.2 Systems Market, Revenue and Forecast to 2030 (US$ Million)
7.2 Services
7.2.1 Overview
7.2.2 Services Market, Revenue and Forecast to 2030 (US$ Million)

8. ELECTRONIC TOLL COLLECTION MARKET ANALYSIS - TECHNOLOGY

8.1 RFID
8.1.1 Overview
8.1.2 RFID Market Revenue, and Forecast to 2030 (US$ Million)
8.2 DSRC
8.2.1 Overview
8.2.2 DSRC Market Revenue, and Forecast to 2030 (US$ Million)
8.3 ANPR
8.3.1 Overview
8.3.2 ANPR Market Revenue, and Forecast to 2030 (US$ Million)
8.4 GNSS
8.4.1 Overview
8.4.2 GNSS Market Revenue, and Forecast to 2030 (US$ Million)
8.5 Others
8.5.1 Overview
8.5.2 Others Market Revenue, and Forecast to 2030 (US$ Million)

9. ELECTRONIC TOLL COLLECTION MARKET ANALYSIS – APPLICATION

9.1 Highways
9.1.1 Overview

9.1.2 Highways Market Revenue, and Forecast to 2030 (US$ Million)
9.2 Urban Zones
9.2.1 Overview
9.2.2 Urban Zones Market Revenue, and Forecast to 2030 (US$ Million)

10. ELECTRONIC TOLL COLLECTION MARKET - GEOGRAPHICAL ANALYSIS

10.1 Overview
10.2 North America
10.2.1 North America Electronic Toll Collection Market Overview
10.2.2 North America Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.2.3 North America Electronic Toll Collection Market Breakdown by Offering
10.2.3.1 North America Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Offering
10.2.4 North America Electronic Toll Collection Market Breakdown by Technology
10.2.4.1 North America Electronic Toll Collection Market Revenue and Forecasts and Analysis - Technology
10.2.5 North America Electronic Toll Collection Market Breakdown by Application
10.2.5.1 North America Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Application
10.2.6 North America Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Country
10.2.6.1 North America Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Country
10.2.6.2 US Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.2.6.2.1 US Electronic Toll Collection Market Breakdown by Offering
10.2.6.2.2 US Electronic Toll Collection Market Breakdown by Technology
10.2.6.2.3 US Electronic Toll Collection Market Breakdown by Application
10.2.6.3 Canada Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.2.6.3.1 Canada Electronic Toll Collection Market Breakdown by Offering
10.2.6.3.2 Canada Electronic Toll Collection Market Breakdown by Technology
10.2.6.3.3 Canada Electronic Toll Collection Market Breakdown by Application
10.2.6.4 Mexico Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.2.6.4.1 Mexico Electronic Toll Collection Market Breakdown by Offering
10.2.6.4.2 Mexico Electronic Toll Collection Market Breakdown by Technology

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10.2.6.4.3 Mexico Electronic Toll Collection Market Breakdown by Application
10.3 Europe
10.3.1 Europe Electronic Toll Collection Market Overview
10.3.2 Europe Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.3.3 Europe Electronic Toll Collection Market Breakdown by Offering
10.3.3.1 Europe Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Offering
10.3.4 Europe Electronic Toll Collection Market Breakdown by Technology
10.3.4.1 Europe Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Technology
10.3.5 Europe Electronic Toll Collection Market Breakdown by Application
10.3.5.1 Europe Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Application
10.3.6 Europe Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Country
10.3.6.1 Europe Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Country
10.3.6.2 Germany Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.3.6.2.1 Germany Electronic Toll Collection Market Breakdown by Offering
10.3.6.2.2 Germany Electronic Toll Collection Market Breakdown by Technology
10.3.6.2.3 Germany Electronic Toll Collection Market Breakdown by Application
10.3.6.3 France Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.3.6.3.1 France Electronic Toll Collection Market Breakdown by Offering
10.3.6.3.2 France Electronic Toll Collection Market Breakdown by Technology
10.3.6.3.3 France Electronic Toll Collection Market Breakdown by Application
10.3.6.4 Italy Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.3.6.4.1 Italy Electronic Toll Collection Market Breakdown by Offering
10.3.6.4.2 Italy Electronic Toll Collection Market Breakdown by Technology
10.3.6.4.3 Italy Electronic Toll Collection Market Breakdown by Application
10.3.6.5 United Kingdom Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.3.6.5.1 United Kingdom Electronic Toll Collection Market Breakdown by Offering
10.3.6.5.2 United Kingdom Electronic Toll Collection Market Breakdown by Technology
10.3.6.5.3 United Kingdom Electronic Toll Collection Market Breakdown by

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Application
10.3.6.6 Russia Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.3.6.6.1 Russia Electronic Toll Collection Market Breakdown by Offering
10.3.6.6.2 Russia Electronic Toll Collection Market Breakdown by Technology
10.3.6.6.3 Russia Electronic Toll Collection Market Breakdown by Application
10.3.6.7 Rest of Europe Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.3.6.7.1 Rest of Europe Electronic Toll Collection Market Breakdown by Offering
10.3.6.7.2 Rest of Europe Electronic Toll Collection Market Breakdown by Technology
10.3.6.7.3 Rest of Europe Electronic Toll Collection Market Breakdown by Application
10.4 Asia Pacific
10.4.1 Asia Pacific Electronic Toll Collection Market Overview
10.4.2 Asia Pacific Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.4.3 Asia Pacific Electronic Toll Collection Market Breakdown by Offering
10.4.3.1 Asia Pacific Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Offering
10.4.4 Asia Pacific Electronic Toll Collection Market Breakdown by Technology
10.4.4.1 Asia Pacific Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Technology
10.4.5 Asia Pacific Electronic Toll Collection Market Breakdown by Application
10.4.5.1 Asia Pacific Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Application
10.4.6 Asia Pacific Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Country
10.4.6.1 Asia Pacific Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Country
10.4.6.2 China Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.4.6.2.1 China Electronic Toll Collection Market Breakdown by Offering
10.4.6.2.2 China Electronic Toll Collection Market Breakdown by Technology
10.4.6.2.3 China Electronic Toll Collection Market Breakdown by Application
10.4.6.3 Japan Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.4.6.3.1 Japan Electronic Toll Collection Market Breakdown by Offering
10.4.6.3.2 Japan Electronic Toll Collection Market Breakdown by Technology

10.4.6.3.3 Japan Electronic Toll Collection Market Breakdown by Application
10.4.6.4 India Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.4.6.4.1 India Electronic Toll Collection Market Breakdown by Offering
10.4.6.4.2 India Electronic Toll Collection Market Breakdown by Technology
10.4.6.4.3 India Electronic Toll Collection Market Breakdown by Application
10.4.6.5 Australia Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.4.6.5.1 Australia Electronic Toll Collection Market Breakdown by Offering
10.4.6.5.2 Australia Electronic Toll Collection Market Breakdown by Technology
10.4.6.5.3 Australia Electronic Toll Collection Market Breakdown by Application
10.4.6.6 South Korea Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.4.6.6.1 South Korea Electronic Toll Collection Market Breakdown by Offering
10.4.6.6.2 South Korea Electronic Toll Collection Market Breakdown by Technology
10.4.6.6.3 South Korea Electronic Toll Collection Market Breakdown by Application
10.4.6.7 Rest of Asia Pacific Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.4.6.7.1 Rest of Asia Pacific Electronic Toll Collection Market Breakdown by Offering
10.4.6.7.2 Rest of Asia Pacific Electronic Toll Collection Market Breakdown by Technology
10.4.6.7.3 Rest of Asia Pacific Electronic Toll Collection Market Breakdown by Application
10.5 Middle East & Africa
10.5.1 Middle East & Africa Electronic Toll Collection Market Overview
10.5.2 Middle East & Africa Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.5.3 Middle East & Africa Electronic Toll Collection Market Breakdown by Offering
10.5.3.1 Middle East & Africa Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Offering
10.5.4 Middle East & Africa Electronic Toll Collection Market Breakdown by Technology
10.5.4.1 Middle East & Africa Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Technology
10.5.5 Middle East & Africa Electronic Toll Collection Market Breakdown by Application
10.5.5.1 Middle East & Africa Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Application
10.5.6 Middle East & Africa Electronic Toll Collection Market Revenue and Forecasts

and Analysis - By Country
10.5.6.1 Middle East & Africa Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Country
10.5.6.2 Saudi Arabia Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.5.6.2.1 Saudi Arabia Electronic Toll Collection Market Breakdown by Offering
10.5.6.2.2 Saudi Arabia Electronic Toll Collection Market Breakdown by Technology
10.5.6.2.3 Saudi Arabia Electronic Toll Collection Market Breakdown by Application
10.5.6.3 UAE Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.5.6.3.1 UAE Electronic Toll Collection Market Breakdown by Offering
10.5.6.3.2 UAE Electronic Toll Collection Market Breakdown by Technology
10.5.6.3.3 UAE Electronic Toll Collection Market Breakdown by Application
10.5.6.4 South Africa Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.5.6.4.1 South Africa Electronic Toll Collection Market Breakdown by Offering
10.5.6.4.2 South Africa Electronic Toll Collection Market Breakdown by Technology
10.5.6.4.3 South Africa Electronic Toll Collection Market Breakdown by Application
10.5.6.5 Rest of MEA Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.5.6.5.1 Rest of MEA Electronic Toll Collection Market Breakdown by Offering
10.5.6.5.2 Rest of MEA Electronic Toll Collection Market Breakdown by Technology
10.5.6.5.3 Rest of MEA Electronic Toll Collection Market Breakdown by Application
10.6 South America
10.6.1 South America Electronic Toll Collection Market Overview
10.6.2 South America Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.6.3 South America Electronic Toll Collection Market Breakdown by Offering
10.6.3.1 South America Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Offering
10.6.4 South America Electronic Toll Collection Market Breakdown by Technology
10.6.4.1 South America Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Technology
10.6.5 South America Electronic Toll Collection Market Breakdown by Application
10.6.5.1 South America Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Application
10.6.6 South America Electronic Toll Collection Market Revenue and Forecasts and Analysis - By Country
10.6.6.1 South America Electronic Toll Collection Market Revenue and Forecasts and

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Analysis - By Country
10.6.6.2 Brazil Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.6.6.2.1 Brazil Electronic Toll Collection Market Breakdown by Offering
10.6.6.2.2 Brazil Electronic Toll Collection Market Breakdown by Technology
10.6.6.2.3 Brazil Electronic Toll Collection Market Breakdown by Application
10.6.6.3 Argentina Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.6.6.3.1 Argentina Electronic Toll Collection Market Breakdown by Offering
10.6.6.3.2 Argentina Electronic Toll Collection Market Breakdown by Technology
10.6.6.3.3 Argentina Electronic Toll Collection Market Breakdown by Application
10.6.6.4 Rest of SAM Electronic Toll Collection Market Revenue and Forecasts to 2030 (US$ Mn)
10.6.6.4.1 Rest of SAM Electronic Toll Collection Market Breakdown by Offering
10.6.6.4.2 Rest of SAM Electronic Toll Collection Market Breakdown by Technology
10.6.6.4.3 Rest of SAM Electronic Toll Collection Market Breakdown by Application

11. ELECTRONIC TOLL COLLECTION MARKET – IMPACT OF COVID-19 PANDEMIC

11.1 Pre & Post Covid-19 Impact

12. COMPETITIVE LANDSCAPE

12.1 Heat Map Analysis by Key Players
12.2 Company Positioning & Concentration

13. INDUSTRY LANDSCAPE

13.1 Overview
13.2 Market Initiative
13.3 New Product Development
13.4 Merger and Acquisition

14. COMPANY PROFILES

14.1 Conduent Inc
14.1.1 Key Facts
14.1.2 Business Description

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14.1.3 Products and Services
14.1.4 Financial Overview
14.1.5 SWOT Analysis
14.1.6 Key Developments
14.2 Kapsch TrafficCom AG
14.2.1 Key Facts
14.2.2 Business Description
14.2.3 Products and Services
14.2.4 Financial Overview
14.2.5 SWOT Analysis
14.2.6 Key Developments
14.3 Mitsubishi Heavy Industries Machinery Systems Ltd
14.3.1 Key Facts
14.3.2 Business Description
14.3.3 Products and Services
14.3.4 Financial Overview
14.3.5 SWOT Analysis
14.3.6 Key Developments
14.4 Thales SA
14.4.1 Key Facts
14.4.2 Business Description
14.4.3 Products and Services
14.4.4 Financial Overview
14.4.5 SWOT Analysis
14.4.6 Key Developments
14.5 Toshiba Infrastructure Systems and Solutions Corp
14.5.1 Key Facts
14.5.2 Business Description
14.5.3 Products and Services
14.5.4 Financial Overview
14.5.5 SWOT Analysis
14.5.6 Key Developments
14.6 TransCore LP
14.6.1 Key Facts
14.6.2 Business Description
14.6.3 Products and Services
14.6.4 Financial Overview
14.6.5 SWOT Analysis
14.6.6 Key Developments

+44 20 8123 2220
info@marketpublishers.com

14.7 Magnetic Autocontrol GmbH
14.7.1 Key Facts
14.7.2 Business Description
14.7.3 Products and Services
14.7.4 Financial Overview
14.7.5 SWOT Analysis
14.7.6 Key Developments
14.8 The Revenue Markets Inc
14.8.1 Key Facts
14.8.2 Business Description
14.8.3 Products and Services
14.8.4 Financial Overview
14.8.5 SWOT Analysis
14.8.6 Key Developments
14.9 Sociedad Iberica de Constructions Electricas SA
14.9.1 Key Facts
14.9.2 Business Description
14.9.3 Products and Services
14.9.4 Financial Overview
14.9.5 SWOT Analysis
14.9.6 Key Developments
14.10 P Square Solutions LLC
14.10.1 Key Facts
14.10.2 Business Description
14.10.3 Products and Services
14.10.4 Financial Overview
14.10.5 SWOT Analysis
14.10.6 Key Developments
14.11 Verra Mobility Corp
14.11.1 Key Facts
14.11.2 Business Description
14.11.3 Products and Services
14.11.4 Financial Overview
14.11.5 SWOT Analysis
14.11.6 Key Developments
14.12 Mitsubishi Heavy Industries Ltd
14.12.1 Key Facts
14.12.2 Business Description
14.12.3 Products and Services

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14.12.4 Financial Overview
14.12.5 SWOT Analysis
14.12.6 Key Developments
14.13 Cubic Transportation Systems, Inc.
14.13.1 Key Facts
14.13.2 Business Description
14.13.3 Products and Services
14.13.4 Financial Overview
14.13.5 SWOT Analysis
14.13.6 Key Developments
14.14 Q-Free ASA
14.14.1 Key Facts
14.14.2 Business Description
14.14.3 Products and Services
14.14.4 Financial Overview
14.14.5 SWOT Analysis
14.14.6 Key Developments

15. APPENDIX

15.1 About the Insight Partners
15.2 Word Index

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