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World Explosive Trace Detection (ETD) Technologies Market 2013-2023

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Abstracts

The threat of explosive devices to governments, private companies and the public continues to drive the explosive detection market. The maturation of such devices has led to their adoption worldwide as a counter to this. Screening requirements have driven the market forward with large purchases from governments and aviation authorities. However, there are significant barriers to continued year-on-year growth, notably due to moves towards risk-based screening and reductions in procurement budgets worldwide. A broadening of the demand base will partially mitigate this. Visiongain has determined that the value of the global explosive trace detection (ETD) technologies market in 2013 will reach $830m.

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Military end-user forecast 2013-2023

Threat Infrastructure end-user forecast 2013-2023

Civil End-user forecast 2013-2023

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Kit ETD procurement forecast 2013-2023

Fixed ETD procurement forecast 2013-2023

R&D forecast 2013-2023

ETD Consumables forecast 2013-2023

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ETD Servicing & Operation forecast 2013-2023

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UK forecast 2013-2023

Brazil forecast 2013-2023

Russia forecast 2013-2023

Mexico forecast 2013-2023

Nigerian forecast 2013-2023

Iraq forecast 2013-2023

Afghanistan forecast 2013-2023

RoW forecast 2013-2023

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Smith's Detection

Morpho Detection

FLIR Systems

Implant Sciences

Scintrex Trace

NucTech

Sibel

RedXDefense

Rapiscan

L-3

Discover the qualitative analysis informing the market forecasts

SWOT analysis of competitive factors: strengths, weaknesses, opportunities and threats revealing what drives and restrains the explosive trace detection industry and the prospects for established companies and new market entrants.

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Visiongain consulted widely with industry experts and a full transcript from Ben Rollins the CEO of Vaporsens, and Brad Chase the Marketing Director of Implant Sciences, are included with this report. As such, our reports have a unique blend of primary and secondary sources providing informed analysis. This methodology allows insight into the key drivers and restraints behind market dynamics and competitive developments, as well as identifying the technological and operational issues. The report therefore presents an ideal balance of qualitative analysis combined with extensive quantitative data including global, submarket and regional markets forecasts from 2013-2023 - all identifying strategic business opportunities within the explosive trace detection sector.

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COMPANIES LISTED

American Innovations
Appealing Products
Autoclear
BAE Systems
BioSensor Applications
British Airways
Chemimage
Chemring
ChemSee
Chemspectra
CSECO
Darley Defense
DetectaChem
DSA Detection
Electronic Sensor Technology
Field Forensics
FLIR
GE Homeland Protection
GE Security
Hitachi
Identa
Implant Sciences

Inscentinel
Ketech Defence
L-3
Law Enforcement Associates
Lindon Defence
Microsilver
Mistral Security
Morpho Detection
Northwest Airlines
Nuctech
OSI Systems
PKI
Plexus Scientific
Princeton Security Technologies
Quantitech
Quasar Federal Systems
Rapiscan
Raptor Detection Tech
REDXDefence
Safran
SAIC
Scanna
Scanna MSC
Scent Detection Technologies
ScentLogix
Scintrex Trace
SIBEL
Smiths Detection
Smiths Group
Spectrafluidics
Thermoscientific
TraceTech Security
Vantage Integrated Security Solutions
Vaporsens
Veteran Corps of America
Westminster International
Xplosafe

ORGANISATIONS MENTIONED IN THIS REPORT

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Afghan National Army
Afghan National Security Forces
Airport Authority of India (AAI)
American Civil Liberties Union (ACLU)
British Army
Bureau of Civil Aviation Security (India)
Cabinet Committee on Security (India)
Canadian Air Transport Security Authority (CATSA)
China Ministry of Railways
Chinese Police Service (CPS)
Chinese Transport Authority (CTA)
Civil Aviation Administration of China (CAAC)
European Union (EU)
Hong Kong International Airport
Indian Central Industrial Security Force (ICISF)
International Air Transport Association (IATA)
International Civil Aviation Organisation (ICAO)
Japanese Nuclear Authority (JNA)
Killeen Fort Hood Regional Airport
Manchester Airport Group
Nigerian Police HQ
Northeastern University
Summit NW
Tsinghua University
UK Customs
UK Department for Transport (DfT)
University of Arizona
University of Utah
US Army
US Congress
US Defence Advanced Research Projects Agency (DARPA)
US Department of Defense (DoD)
US Department of Homeland Security (DHS)
US Federal Aviation Administration (FAA)
US Government Accountability Office (GAO)
US Joint Improvised Explosive Device Defeat Organisation (JIEDDO)
US National Nuclear Security Agency (NNSA)
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About

Leading Companiesin the Explosive Trace Detection Market

It is difficult to determine the level of revenues derived solely from ETD screening technologies,since company reports generally include EDS as well as ETD, and most incumbent firms are involved in the production of both. Therefore, this list does not seek to determine market share, but provide an overview of the major companies within the sector. It is also important to note that the majority of companies listed in the top ten do not produce ETD kit devices.

This is for two reasons. Firstly, the type of technology used in kit devices – colorimetric – is significantly different than the more advanced technology required of other ETD devices. Secondly, the profit margins of Kit type devices are wafer thin due to low barriers to entry, and therefore do not present sufficient earnings potential for larger enterprises. The market for ETD kits mostly comprises a large number of SME's. The businesses involved in the ETD market are mostly larger enterprises. The procurement strategies of the US DoD in particular can help to explain this discrepancy, since the DoD can restrict procurement contracts to SME's. It has done this in order to foster healthy competition, and this goal can be considered extremely successful given that there are dozens of firms that produce such products, and a partial list is included and the end of this section.

Safran / Morpho Detection

Safran is a French conglomerate involved in defence, aerospace propulsion and equipment, and security. It was formed as a result of a merger between SNECMA, the propulsion and aerospace equipment group, and the defence conglomerate SAGEM. The company's headquarters are located in Paris. Through Morpho Detection, the subsidiary working in security technologies, Safran operates three distinct submarkets covering identification, e-documents and detection. Systems included in the identification submarket consist of automated fingerprint identification and identity management. In 2011 the company finalised its acquisition of L1 Identity Solutions for $1.09bn as part of a plan to expand its market share in biometric technologies, access control and secure ID document businesses. Safran is also a leading provider of detection equipment which includes computed tomography systems, Raman spectroscopy, trace detection technology and xray systems and the company lays claim to the fact that it has installed over 12,000 trace detection systems around the world.

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