

Report Information

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Electronic Toll Collection Market Research Report -Forecast to 2030

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Description:

Global Electronic Toll Collection Market Overview:

Electronic Toll Collection Market Size was valued at USD 9.1 billion in 2021. The Electronic Toll Collection market industry is projected to grow from USD 9.7 billion in 2022 to USD 16.8 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 7.1% during the forecast period (2022 - 2030). The various factors attributing to the growth of the electronic toll collection market are the increasing demand for minimizing traffic congestion and fuel consumption at toll stations, increasing government initiative towards improved road safety and infrastructure, and the growing need for transparency in revenue performance. Furthermore, the need for superior video analytics in automatic number plate recognition and classification of vehicles is expected to present lucrative opportunities for the market players during the forecast period.

FIGURE 1: Electronic Toll Collection Market 2018-2030

Electronic Toll Collection Market 2018-2030

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Covid-19 Analysis

The pandemic had restricted the growth of several manufacturing verticals and production units. Especially automotive, construction, transportation, and semiconductor industries were affected by the pandemic severely. The manufacturing units were shut down and therefore the disruption in the supply and chain was also intensified throughout the pandemic. Such factors have significantly affected the overall growth of the Electronic Toll Collection industry. Moreover, the raw materials for the electronic equipment such as RFID chips, controllers, processors, cameras, and transponders were shipped from the countries like China, and the US to manufacturing units across the globe. Since there has been a huge restriction for movement across the globe and logistics restrictions at the international borders, the raw materials were not transported to the manufacturing companies which affected the manufacturing processes as well. Therefore, the Electronic Toll Collection Industry value has been significantly affected by the widespread COVID-19.

Electronic Toll Collection Market Trends

Rising Demand For Minimizing Traffic Congestion And Fuel Consumption At Toll Stations

Traditional toll collection systems used to handle most transactions in cash mode of payments, which required much more time to complete the transaction. Meanwhile, the vehicle drivers needed to keep their engines running, thereby increasing the pollution levels in the toll plaza area. Additionally, the transaction time increased the traffic congestion in the lane, leading to increased fuel consumption at the toll station, resulting in higher emission levels due to the idling fuel wastage. This exposed the toll collection staff to severe airborne diseases and excessive lifetime cancer risks (ELCR). To minimize the risk and exposure to harmful emissions, including hydrocarbons, carbon monoxide, and carbon dioxide, from automotive vehicles, electronic toll collection (ETC) systems have proven to be beneficial and maximize the throughput. By adopting an ETC system, the toll agencies can automate the toll collection process, which in turn enhances the speed, accuracy, and lowers the operational costs & revenue leakages, especially in the toll plazas accepting payments in cash, which is driving the growth of the market.

Electronic Toll Collection Market Segment Insights:

Electronic Toll Collection Technology Insights

Based on technology, the Electronic Toll Collection Market is segmented into automatic vehicle identification (AVI), automated vehicle classification (AVC), violation enforcement system (VES), and toll transaction processing system. Toll Transaction Processing System is expected to hold a largest market share in electronic toll collection market. A toll transaction processing system charges a toll to users without requiring any action or stopping. The system debits the amount from the account of the registered car owners or identifies the license plate for later billing without requiring vehicles to stop. It performs an electronic monetary transaction between a vehicle passing through a toll plaza and the toll collection agency. It

improves the speed and efficiency of traffic flow and saves the driver's time. This system enables transactions to be performed while vehicles travel at near-highway speed, allowing seamless travel by the road users along national highways.

Electronic Toll Collection Means of Collection Insights

Based on means of collection, the Electronic Toll Collection Market is segmented into prepaid and postpaid. The postpaid segment accounted for the larger market share in 2021. However, prepaid segment is projected to exhibit a CAGR of 8.6%. A prepaid system is more widely preferred, as low amounts of most tolls make a follow-up of uncollected debts expensive.

FIGURE 2: Electronic Toll Collection Market SHARE BY MEANS OF COLLECTION 2021 (%)
Electronic Toll Collection Market SHARE BY MEANS OF COLLECTION 2021

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Electronic Toll Collection Application Insights

Based on application, the Electronic Toll Collection Market is segmented into roads, bridges, tunnels, and ferries. Roads segment is expected to hold a largest market share. Roads tolls save time and reduce energy consumption by reducing stop-and-go traffic associated with vehicles approaching toll plazas, parking to pay tolls, and speeding up, rejoining the normal traffic flow. These systems have the capacity to move five times as many vehicles as do conventional toll lanes. When the vehicle passes a roadside toll reader device, a radio signal from the reader triggers the transponder, which transmits back an identifying number that registers the vehicle's use of the road, and an electronic payment system charges the user the toll.

Electronic Toll Collection Regional Insights

The Electronic Toll Collection market in North America is likely to hold the highest revenue share of 38.0% in 2021 and it is projected to increase at a significant growth rate in the future. The United States and Canada have the most autos per person in North America, which is one of the most critical factors propelling the electronic toll collection market ahead. Furthermore, both countries have the world's largest interstate and state road networks, with innovative toll collection systems deployed in numerous locations and other toll installation projects for high-traffic parts underway. Furthermore, advancements such as real-time vehicle tracking and monitoring via GPS/GNSS, as well as the deployment of RFID sensors in developing countries such as Japan, China, and India, are propelling the electronic toll collection industry forward.

FIGURE 3: Electronic Toll Collection Market SHARE BY REGION 2021 (%)
Electronic Toll Collection Market SHARE BY REGION 2021

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Electronic Toll Collection Key Market Players & Competitive Insights

The market for electronic toll collection (ETC) systems has been witnessing steady growth over the forecast period due to the growing adoption of electronic toll collection systems in the transportation sector. There exist several local, regional, and global players in the electronic toll collection market who continuously strive to gain a significant share of the overall market. During the study, MRFR has analyzed some of the major players in the Electronic Toll Collection Market who have contributed to the market growth. The key players in the market have adopted various strategies, such as product portfolio expansion, mergers & acquisitions, agreements, geographical expansion, and collaborations, to increase their market penetration and strengthen their foothold in the industry.

Key Companies in the Electronic Toll Collection market include

- Abertis
- Sanef
- Atlantia S.p.A
- Conduent Inc.
- Cubic Corporation
- Denso Corporation
- EFKON GMBH
-

GeoToll

- International Road Dynamics Inc.
- Kapsch TrafficCom AG
- Neology Inc.
- Perceptics LLC
- Q-Free ASA
- Raytheon Company
- Siemens AG
- Transcore
- Thales Group
- Others

Electronic Toll Collection Industry Developments

June 2021: The Ohio Turnpike and Infrastructure Commission (OTIC) renewed its contract with TransCore for state-wide toll collection and customer service center maintenance services for another five years. All aspects of the OTIC's toll collection system, which is placed throughout Ohio's turnpike network and the customer support center system in Berea, Ohio, will be maintained by TransCore.

May 2021: The Metropolitan Transportation Authority of New York awarded three corporations contracts worth approximately USD 400 million to handle various toll system operations at its bridges and tunnels. For years, the MTA and other tolling agencies in New York, including the state thruway authority, have entrusted all their tolling operations to one company, Conduent Inc.

August 2021: Quarterhill Inc., a company focused on the Intelligent Transportation System (ITS) and Intellectual Property licensing industries, constantly pursuing an acquisition strategy that capitalizes on attractive trends in ITS and its adjacent markets, entered into a definitive agreement to purchase Electronic Transaction Consultants, LLC from Align Capital Partners. By leveraging riteSuite, Electronic Transaction Consultants, LLC's highly customizable suite of mobility-focused technologies, the agreement with Quarterhill will enable the company to extend its existing portfolio and expand into adjacent sectors.

Electronic Toll Collection Market Segmentation:

Electronic Toll Collection Technology Outlook

- Automatic Vehicle Identification (AVI)
- Automated Vehicle Classification (AVC)
- Violation Enforcement System (VES)
- Toll Transaction Processing System

Electronic Toll Collection Means of Collection Outlook

- Prepaid
- Postpaid

Electronic Toll Collection Application Outlook

- Roads
- Bridges
- Tunnel
- Ferries

Electronic Toll Collection Regional Outlook

- North America
 - US
 - Canada
 - Mexico
- Europe
 - Germany
 - France
 - UK
 - Rest of Europe
- Asia-Pacific

- China
- Japan
- India
- Rest of Asia-Pacific
- Middle East & Africa
- South America

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