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US Counter-Human Trafficking Technology

Market Analysis

A first-of-its-kind report analyzing the explosive growth of the U.S. counter-human trafficking technology market — tracking trends, innovations, and investment opportunities across 15 key segments.

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Introduction

to the US Counter-Human Trafficking Tech Market

Countries across the globe have begun to identify human trafficking (HT) as one of the chief concerns of society. Human trafficking is a uniquely threatening crime. Unlike other serious human rights abuses (e.g. domestic abuse, child abuse, etc.), human trafficking is financially motivated from the trafficker's perspective.

$347 Billion

Generated in illicit profits from human trafficking every year

a figure that grows annually (Nasdaq).[1] This profit-driven nature means the crime is growing at an industrial scale, which in turn intensifies the urgency for a strategic response. Traffickers regularly abuse technology and are heavily incorporating advanced tech into systems and networks. That same technology, however, is becoming the cornerstone in counter-HT efforts. U.S. Secretary of State Antony Blinken said:

"At the same time, technology is also one of our most powerful tools to combat this enduring scourge. Mobile phones, social media platforms, and artificial intelligence (AI) make it possible for advocates and law enforcement to raise greater awareness about the rights of workers and migrants, locate victims and perpetrators of online sexual exploitation, and analyze large amounts of data to detect emerging human trafficking trends." [2]



Antony Blinken
Secretary of State
United States

Introduction to the market

There is incredible variety in the counter-HT tech market, both in the types of technologies developed and the different users of such technology. In short, existing technologies are being adapted for counter-HT uses, while new technologies are being created to combat trafficking specifically.

From artificial intelligence uncovering hidden patterns in online exploitation to blockchain ensuring ethical supply chains, adopting counter-HT tech solutions is becoming a strategic necessity for governments, businesses, and nonprofits alike.

Most importantly, for-profit businesses have newly found the need to integrate counter-HT technology into their daily operations, or to even create entire business models that center around counter trafficking.

This new phenomenon will massively expand the market over the next five years. The modern socioeconomic environment places a call to action on all actors, no longer focusing solely on the nonprofit. With economic, social and legislative pressures mounting on businesses, government, and nonprofits, the counter-HT tech market is on the precipice of rapid expansion.

Market Summary

The US Counter-Trafficking Tech Market size is estimated at

$482m as of year 2024

and is expected to reach

$4,234m by 2030 at a **CAGR of 43.7%** during the forecast period.

Growth Drivers

- → Rapidly spreading **social awareness and expectations of change.**
- → An **unprecedented legal environment** for human trafficking.
- → National & International Security interests resulting from **rapidly shifting geopolitics.**
- → **Advancements and innovations in tech** that enable and spur new solutions.

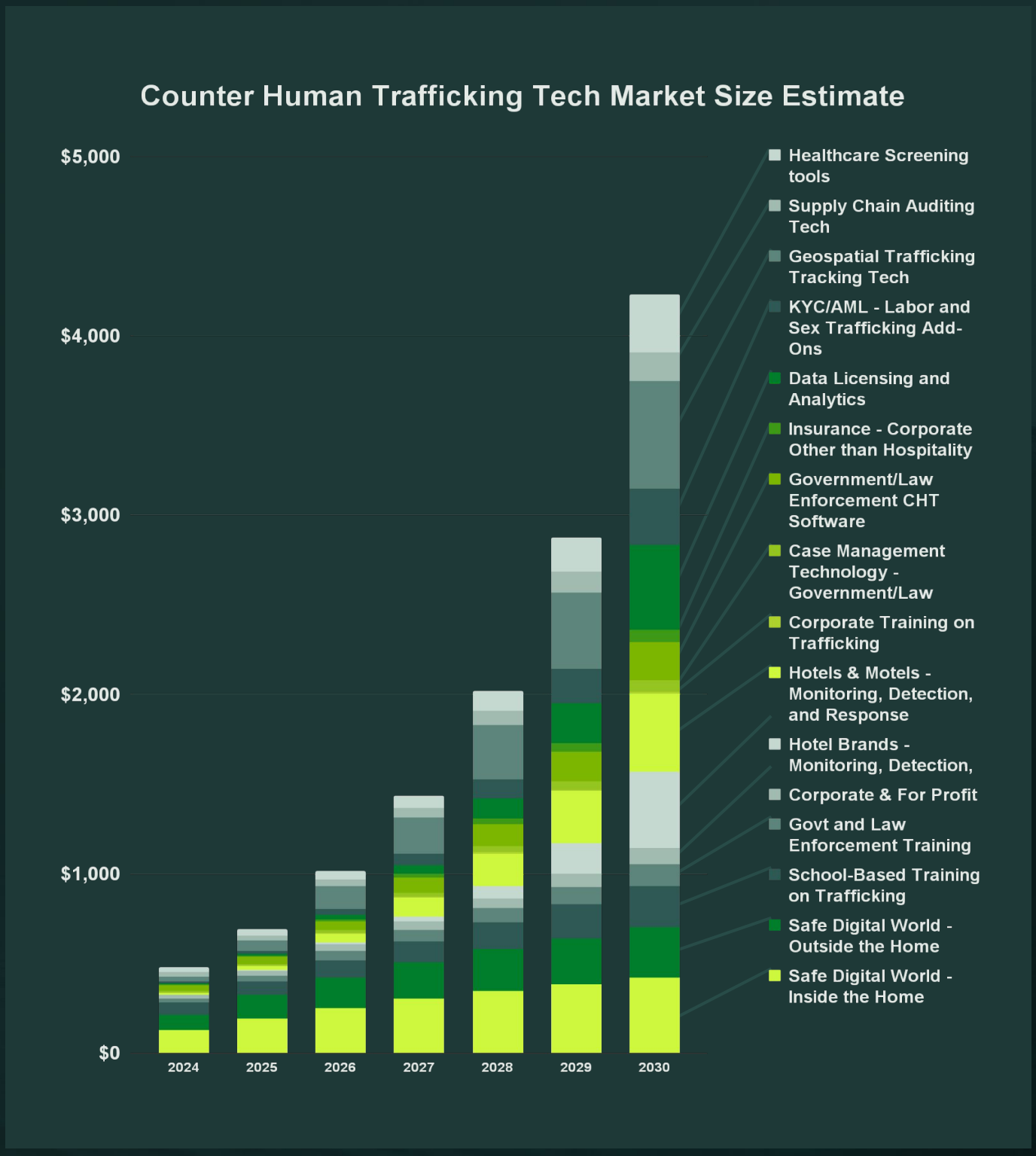
Market Summary

The Counter-Human Trafficking
Tech Market can be reasonably divided into the following

8 Segments

1. Safe Digital World
   → Inside the Home
   → Outside the Home
2. Tech Enabled CHT Training
   → School-Based Training on Trafficking
   → Govt and Law Enforcement Training on Trafficking
   → Corporate Training on Trafficking
3. Monitoring, Detection, and Response in Hospitality
4. Law Enforcement Counter Trafficking Technology
   → Case Management Technology • NFP
   → Case Management Technology • Government/Law Enforcement
   → Government/Law Enforcement CHT Software
   → Geospatial Trafficking Tracking Tech
5. CHT Insurance
   → Insurance • Hotels & Motels
   → Insurance • Corporate Other than Hospitality
6. KYC/AML
   Labor and Sex Trafficking Add-Ons
7. Supply Chain Transparency
8. Healthcare Screening Tools

Market Summary



Social Analysis

Perhaps no social factor is more important to the growth of the counter-HT technology market than **rapidly spreading awareness and an increased expectation of action**. Though it is difficult to quantify exactly how "aware" a market or society is becoming with a single statistic, observing the trends of social programs and movements can effectively tell the story.

Close observation shows that awareness efforts are penetrating the U.S in

- Top-down programs
- Bottom-up grassroots movements
- The ubiquitous influence of social media on an increasingly influential generation

Top-down programs

Over the past several years, top-down programs and initiatives like Congress' Trafficking Victims Protection Reauthorization Act (TVPRA), International Labour Organization (ILO), and United Nations Department of Crime (UNDOC) have increased counter-HT funding and spending. We estimate that the U.S. alone can be expected to spend

over $1.5 billion on counter-HT efforts in the next five years
(Projections based on Shared Hope's Fact Sheet: Trafficking Victims Protection Reauthorization Acts (TVPRA)[1]

Government-sponsored awareness and prevention programs like DHS Blue are gaining national attention (higher engagement rates, report rates, and funding). Large non-profit organizations like IJM (International Justice Mission), Humanity United, Walk Free, and NCOSE continue to stoke flames of awareness from the top down. Through these major federal programs,over 273,000 individuals received trained and hundreds of formal training events occurred.[2]

Social Analysis

Bottom-up grassroots movements

New, bottom-up, grassroots movements have emerged in various communities. Local government movements like Colorado's Western Slope Initiative and faith-based movements like the Freedom Church Alliance are examples of communities mobilizing against HT.

24% Increase in prosecutions [1]	**28%** Increase in convictions [1]	**16%** Increase in victims identified [1]

indicating a societal change toward active response on a community level.

The ubiquitous influence of social media on an increasingly influential generation

In addition, the proliferation of social media amongst an increasingly influential young generation has narrowed the knowledge gap in HT awareness.

Polaris's 2022 social media campaigns saw

70% engagement from under-35s

signaling a highly aware demographic. In 2024, several counter-HT hashtags (#EndSlavery, #HumanTrafficking, etc.) were among the year's most popular human rights hashtags.[2] As this active and aware generation climbs corporate and political ladders, businesses and governments will have a keener interest in investing in counter-HT technology.

Social Analysis

The growth of top-down programs/movements, bottom-up grassroots organizations, and social media's influence will continue to advance counter-HT awareness. Widespread awareness will heap pressure on businesses, government agencies, and nonprofits, with pressure coming from multiple angles:

1 Employees & Business Leaders

A growing segment of the workforce are purpose-driven, expecting employers to take meaningful action on human rights. As the younger generation progress into leadership roles, their ideals will bleed into business directives. More than ever, counter-HT initiatives can support morale, engagement, and talent retention.

2 Customers

With public awareness of trafficking on the rise, businesses have an opportunity to capture market share through counter-HT initiatives. Sectors that are known to intersect with trafficking risks - like hospitality or entertainment - will keenly feel this pressure. Companies that proactively respond may gain and retain more customers.

3 Investors & Partners

ESG criteria are a key aspect to investment and procurement decisions. Demonstrating social impact through counter-HT work can strengthen a company's case to investors; businesses that operate with robust supply chains will be especially exposed to this pressure.

4 Regulators & Legal Frameworks

Some companies (or their peers) are already facing legal or reputational challenges tied to human trafficking. Counter-HT tools will increasingly become necessary to manage compliance and risk.

Legal Analysis

While social factors are driving market growth through indirect pressure to market players, counter-HT legal developments are driving growth primarily through direct pressure. New legislation and legal rulings have created an environment that rewards counter-trafficking while penalizing non-compliance and negligence. This new legal environment will reward, encourage, and incentivize action against human trafficking.

The counter-HT tech market will see growth from

- Surging Counter-HT Legislation
- Groundbreaking court rulings that drive action

Surging Counter-HT Legislation

Over the past 5 years, legislatures at all levels have diligently strengthened counter-HT laws, acts, and initiatives. Several examples reflect this trend. For instance, the Justice for Victims of Trafficking Act (JVTA) saw updates in 2022 via the Violence Against Women Act Reauthorization Act (Pub. L. No. 117-103), adding provisions for survivor-led training and expanded restitution for victims.

More notably, Congress passed the Trafficking Victims Protection Reauthorization Act (TVPRA) in 2022, extending funding through FY 2026 while widening the scope of the original TVPA. Although accessing these funds can be difficult, the barriers are coming down and the funds are reaching the market.

In state legislatures,

all 50 U.S. states have refined or strengthened counter-trafficking laws.

Legal Analysis

Other notable examples include North Dakota's mandatory minimum sentences for trafficking (passed April 2025)[1] and Colorado's Strengthening Enforcement of Human Trafficking laws (2024).[2] This broad-based legislative trend drives demand for efficient (tech) solutions and signals long-term commitment to the fight against HT.

Groundbreaking court rulings that drive action

As societal values shift, courts have set monumental precedents in the legal environment of HT. The most significant growth driver is an increase in TVPRA lawsuits and penalties administered in recent years.

High-profile cases include suits against Hilton and Wyndham (2023), with settlements

exceeding $40M[3]

Other groundbreaking cases like Doe v Salesforce (2025) are changing the narrative on human trafficking legal precedent by placing liability burdens on service providers (such as Salesforces). These rulings exert pressure on industries to adopt tech like hospitality industry monitoring, supply chain auditing tech, and illicit cash flow analysis. Legal risks are a top growth driver, especially for insurance-linked segments.

Geopolitical Analysis

Rapid shifts in geopolitical dynamics will galvanize government and market players against trafficking. In the past 10 years, human trafficking cartels and syndicates have become larger, more complex, and more technologized. As a result, they now pose threats to human security at the national and political level, not just at individual and business level. The counter-HT tech market will expand in response to the geopolitical threats human trafficking presents.

Expanding geopolitical threats from human trafficking will cause growth because of

- National Security Interests
- International Business and Advocacy

International Business & Advocacy

Human trafficking shows no respect for international borders. Cartels and Syndicates run global operations that span access countries and continents. Some countries, like the United Kingdom and Australia, are taking action to combat trafficking in their territory, while others still have work to do (Walk Free Index). International Advocacy groups abound. Groups like International Justice Mission and Human Trafficking Institute advocate against trafficking by influencing governments and policymakers to create and enforce laws that protect vulnerable populations from issues like human trafficking, slavery, and violence against women and children.

Many of these groups are based out of or operate in the United States. As the need for international alignment grows, so too will these organizations.

The intersection of international business and counter-human trafficking is increasingly critical as global supply chains expose companies to trafficking risks, especially in sectors like agriculture, apparel, and mining. With growing regulatory pressure from laws like the UK Modern Slavery Act and the EU Due Diligence Directive, businesses must ensure their suppliers uphold human rights standards.

Companies are responding through supply chain audits, ethical recruitment, and partnerships with NGOs and governments. By leveraging their global reach and resources, international firms can help prevent exploitation while protecting their brand and ensuring long-term sustainability.

Geopolitical Analysis

The global nature of trafficking means that the US-based counter-HT tech companies will extend their business to international markets. Both B2G and B2B U.S. companies will see their products receive global adoption, especially where native solutions do not yet exist. As trafficking networks operate transnationally, solutions aimed at identifying, disrupting, and preventing these crimes must also scale across regions and adapt to different regulatory and cultural contexts. U.S. companies that develop advanced tools (such as victim identification software, supply chain risk platforms, case management systems, and intelligence-sharing frameworks) are increasingly in demand worldwide.

National Security Interests

National Security is of the utmost importance to the U.S. government. According to the DHS, "Protecting the American people from terrorist threats is the reason DHS was created, and remains our highest priority."

The traditional conception of national security is primarily concerned with territorial security and with national power. An expansion of this conception is necessary. An oft-overlooked aspect of national security is "human security." Human security has less to do with the the entity of a nation-state and more to do with the people of that nation.

> *"Human security, in its broadest sense, embraces far more than the absence of violent conflict. It encompasses human rights, good governance, access to education and health care and ensuring that each individual has opportunities and choices to fulfil his or her potential. Every step in this direction is also a steep towards reducing poverty, achieving economic growth and preventing conflict. Freedom from want, freedom from fear, and the freedom of future generations to inherit a healthy natural environment -- these are the interrelated building blocks of human -- and therefore -- national security."*
>
> — Kofi Annan, Former Secretary General of the United Nations

Further, Geopolitical conflict is almost always accompanied by trafficking crimes (SOS international). In recent years, there has been a massive convergence between organized terrorist or crime groups and organized traffickers.[1] Because of the correlation between national security threats and organized trafficking, a strong national response in the interest of national security is necessarily a response to trafficking.

Technological Analysis

Technological factors accelerate and facilitate action. The counter-HT technology market is poised for rapid expansion and growth because of the **unprecedented emergence of new technological capabilities**. Governments, NGOs, tech companies, and law enforcement will continue to deploy advanced tools to detect, prevent, and dismantle human trafficking operations.

This tech movement blends data analytics, machine learning, natural language processing (NLP), blockchain, and geospatial tech to tackle a crime that affects over 40 million people globally.

In particular, the four most relevant technological accelerators are

- AI-Powered Tools
- Geospatial Tracking Tools
- Visual Processing Technology
- Victim Support Tools

AI-Powered Tools

AI and machine learning are fueling the counter-HT tech market. AI tools are beginning to bring into the light intricate details of how the illicit business models of human trafficking are proliferating. This will mean that we are likely to see some of the most successful human trafficking interventions ever in the next decade, and this success will breed further innovation and investment. **AI tools are capable of analyzing vast datasets - social media posts, online ads, chat logs - to identify trafficking signals (e.g., coded language, suspicious images).**

Tools like **Thorn's Spotlight** and **Safer** use machine learning to flag trafficking activity in recent years. Numerous examples of AI's capability and industry adoption exist.

Financial giant JP Morgan and Chase has committed $300 million to defunding human trafficking through AI - powered analytics[1, 2]

Technological Analysis

Polaris's Financial Intelligence Unit (launched 2021 with PayPal) has identified

Millions in illicit trafficking funds using AI tools.

Blockchain pilots (e.g., IBM's 2022 supply chain trials) verify ethical sourcing in apparel and seafood; HSBC's 2024 AML upgrade flagged 300 trafficking-linked accounts using AI. AI slashes the cost of data analytics, making trafficking detection cheaper than ever and spurring action from giants like Meta and PayPal or NGOs like Thorn.

Geospatial Tracking Tools

Geospatial and Predictive Analytics are more traditional tech solutions that utilize satellite imagery and predictive models to combat trafficking. Advancements in satellite technology and integration with AI tools have greatly enhanced geospatial mapping tools' effectiveness in recent years.

A 2024 IOM pilot used geospatial tracking tools to predict trafficking through irregular movement patterns, leading to many direct rescues.

Post-2022, tools like Global Fishing Watch adapted geospatial tech to track labor trafficking on vessels, while UNODC's 2023 predictive models flagged border zones (e.g., U.S.-Mexico). Adoption rates and use cases are expected to rise as AI enhances effectiveness and innovation cuts costs. Esri's ArcGIS Pro Intelligence platform has been leveraged by law enforcement to identify trafficking hotspots, map victim movement, and detect meeting patterns between traffickers and potential victims. As a commercial geospatial leader, Esri continues to expand partnerships that support anti-trafficking investigations through advanced spatial analytics.[1]

Technological Analysis

Visual Processing Technology

Visual processing technology is a powerful tool in combating human trafficking that **enhances detection and rescue efforts**. Using advanced image recognition, it can analyze surveillance footage, social media, or online platforms to identify potential trafficking victims, suspicious activities, or known perpetrators. By automating and accelerating data analysis, it empowers law enforcement and NGOs to act swiftly, disrupt trafficking networks, and protect vulnerable populations.

Visual processing technologies, such as computer vision, facial recognition, and image analytics, are increasingly used by governments and private companies to combat human trafficking. Tools like *TraffickCam* and *Traffic Jam* help law enforcement match images from escort ads to real-world hotel rooms and track trafficking patterns, aiding in the recovery of over 120 victims.[1] Biometric firms like ROC provide facial and iris recognition software to nonprofits like DeliverFund to streamline victim and suspect identification. The U.S. Department of Homeland Security's StreamView system analyzes real-time video feeds to flag suspicious behavior, while SAS and MITRE use visual dashboards to surface trafficking indicators in police narratives and unstructured data.

Cellebrite's AI-powered Pathfinder software processed data from over **45,000 images** and chat logs extracted from smartphones as part of a multi-agency sting operation in Texas, **leading to a substantial number of liberated trafficking victims.**[2]

Segment Analysis

- → Safe Digital World
  - Inside the Home
  - Outside the Home
- → Tech Enabled CHT Training
  - School-Based Training on Trafficking
  - Govt and Law Enforcement Training on Trafficking
  - Corporate Training on Trafficking
- → Monitoring, Detection, and Response in Hospitality
- → Law Enforcement Counter Trafficking Technology
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  - Insurance • Corporate Other than Hospitality
- → KYC/AML • Labor and Sex Trafficking Add-Ons
- → Supply Chain Transparency
- → Healthcare Screening Tools

Segment Analysis

Safe Digital World for Children

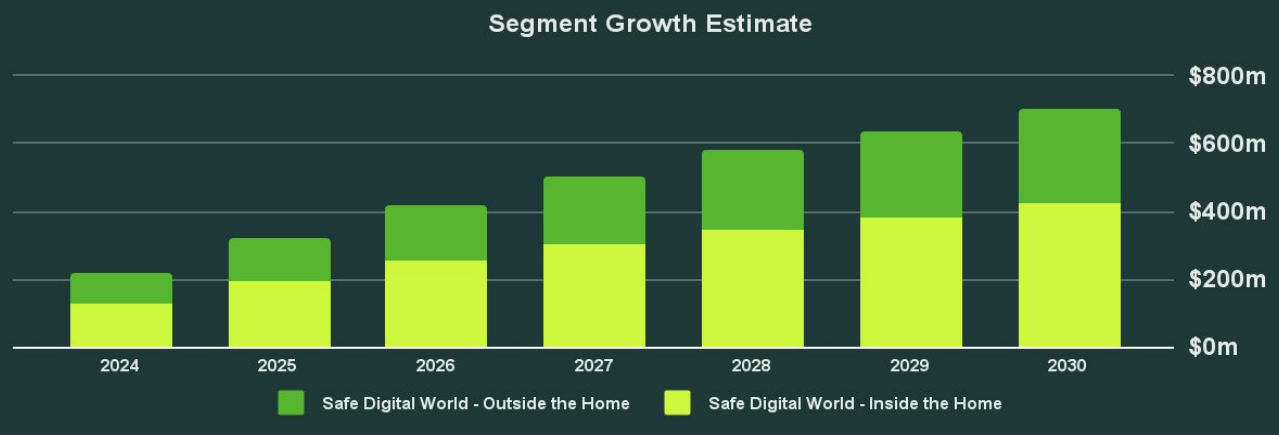
A safe digital world in the context of the **counter-human trafficking (CTH)** movement refers to an online environment where technology is leveraged to prevent exploitation, protect survivors, and disrupt trafficking networks, while safeguarding the rights and data of those who might be more vulnerable. In particular It involves a coordinated approach among governments, tech companies, civil society, and survivors.

In an increasingly digitized world, the sexualization and exploitation of men, women and - most alarmingly - children is producing a self-destructive cycle, where the accessibility of exploitative content has led to a generation that consumes it like never before.

Market players in the Safe Digital World segment attempt to tackle the viewing (accidental or otherwise), creation, and broadcasting of all types of exploitative content. One of the core pillars of the counter trafficking movement is to dismantle the pornography industry, and especially to protect children from it. Thus, any technology used to prevent children's exposure to explicit content is part of the addressable market.

21.7%
5-Year CAGR

$703m
Est. 2030 Market Size



Segment Analysis

Safe Digital World for Children

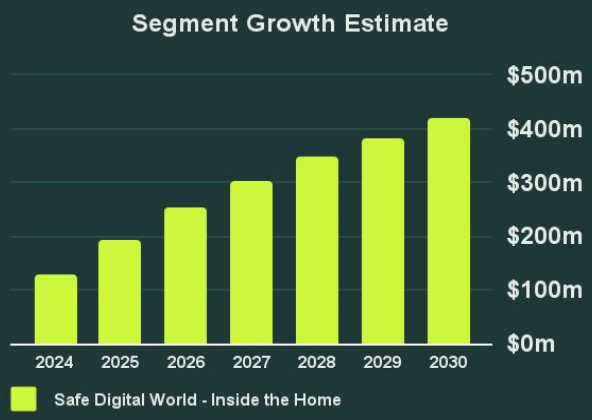
Inside the home

The safe digital world inside the home refers to technology (i.e., image blocking, text monitoring, chat monitoring, social media monitoring, site blocking, etc.) that parents or guardians use to safeguard their children against harmful digital exposure.

The safe digital world inside the home segment is estimated to be between $74 and $167m as of YE 2024 and is projected to grow at a 21.7% CAGR to $241m - 542m by 2030. The primary growth driver is a rapidly increasing parental awareness that trafficking is indeed a local U.S. problem on a large scale and not just overseas. Additionally, increased use of social media and gaming platforms (e.g., Roblox, TikTok) by children heightens exposure to trafficking recruiters, driving parental demand for protective tech.

21.7%
5-Year CAGR

$422m
Est. 2030 Market Size



Outside the home

The safe digital world outside the home is similar in scope to technology inside the home, but typically takes a variant form, has unique penetration rates, and has different growth drivers.

This segment refers to technology (i.e., Image blocking, text monitoring, chat monitoring, social media monitoring, site blocking, etc.) that institutions outside the home, especially schools, use to safeguard the children, especially students.

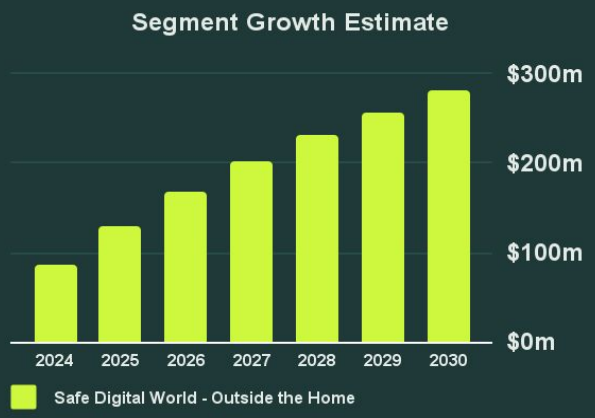
Segment Analysis

Safe Digital World for Children

The safe digital world outside the home segment is estimated to be between $49m and $110m as of YE 2024 and is projected to grow at a 21.7% CAGR to $281m by 2030. The primary growth driver is a growing social awareness that children are at a greater risk in the digital world than parents realized previously. In addition, social expectations placed on institutions like schools, libraries, sports groups continue to grow. Finally, lawsuits against schools officials (such as Jane Doe vs Klein ISD in TX) establish culpability and liability for negligence, driving urgency.

21.7%
5-Year CAGR

$281m
Est. 2030 Market Size



Methodology

We used a bottoms up approach to estimate the Safe Digital World market segments. We benchmarked our ARR figures against players like Aura and GameSafe to gauge what the market might be willing to pay. We used the total number of children between the ages of 9 and 15 to approximate the customer pool. We used a variable penetration rate that is benchmarked against players like Disney Circle.

Segment	ARR	Potential Customers	TAM	Penetration	Segment Estimate
Inside the Home	$180	41.1m	$7.4b	1%-2.25%	$74 - $167m
Outside the Home	$120	41.1m	$4.9b	1%-2.25%	$49 - $111m

Segment Analysis

Safe Digital World

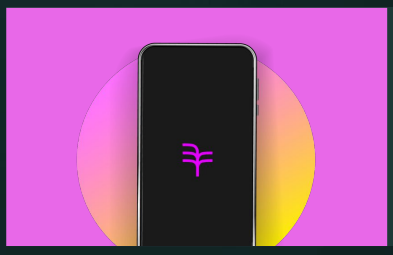
Harm Block

Case Study • Harm Block

HarmBlock is Protecting Children From Online Exploitation and Harmful Content



→ Predators Are Exploiting Technology



→ HarmBlock completely blocks explicit content on a child's device

Buyers & Investors are flocking to HarmBlock

- → HarmBlock has raised **over $16M+** from investors
- → The firm actively serves **over 50,000 families**, making their digital world safer

Segment Analysis

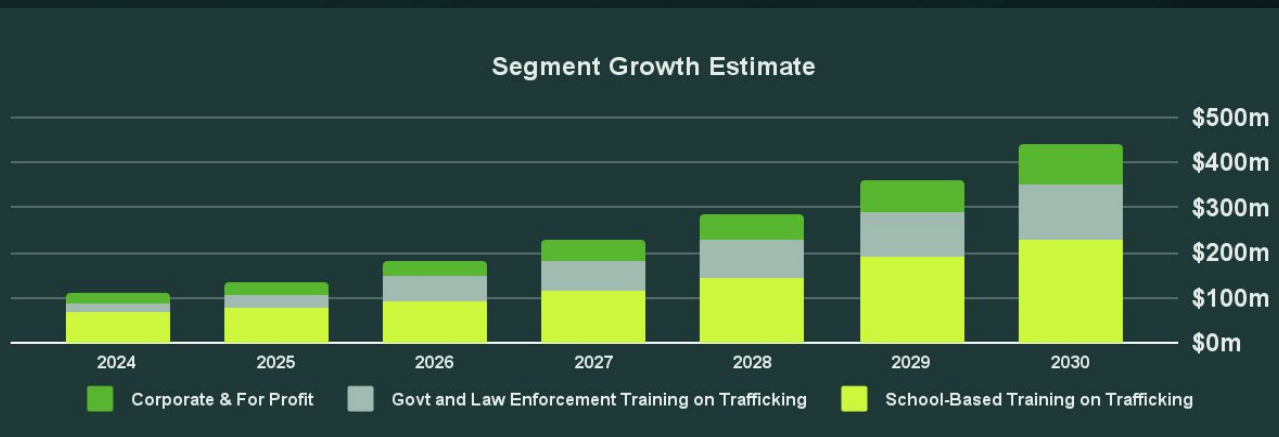
Counter Trafficking Training

Tech-enabled training to counter human trafficking refers to the use of digital tools, platforms, and technologies to educate individuals, professionals, and communities about the dynamics, indicators, and responses to human trafficking. This approach leverages technology to improve accessibility, engagement, and scalability of anti-trafficking education.

Training has become a staple of Corporate America, with employers viewing it as a method of future proofing an organization, to shape culture, to increase employee engagement, and to help make people better at their jobs. Training has also become a response to social and moral pressure, wherein organizations wish to protect, equip or empower their workforce regarding a particular issue. More than ever, organizations are pushing some form of training against human trafficking. CHT training provides different benefits to different groups from everyday workers who simply need a framework to recognize and respond to trafficking in the workplace, to law enforcement officers who need tactics and strategies to detect, respond to, and rescue trafficked persons. Any training that is conducted for the purpose of preventing, detecting, responding to, reporting, or intervening in human trafficking is considered CHT training. Most (though not all) training is administered through or with the aid of technology, such as online courses, digital certifications, and digital presentations.

25.9%
5-Year CAGR

$440m
Est. 2030 Market Size



Segment Analysis

Counter Trafficking Training

Govt & Law Enforcement

Counter-trafficking training technology used by governments and law enforcement includes a mix of e-learning platforms, virtual reality (VR) simulations, mobile apps, and AI-powered tools. These technologies help train officers to identify trafficking indicators, conduct victim-centered interviews, and follow legal procedures. VR and scenario-based simulations allow immersive practice in high-stress situations, while online modules offer flexible, standardized instruction.

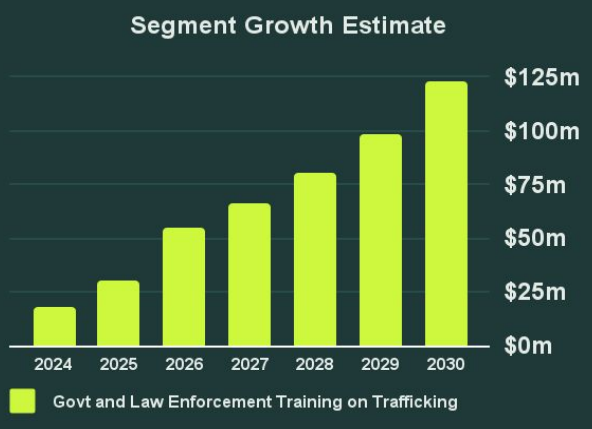
Some systems also use data analytics and real-time case tracking to support investigations. These tools aim to build awareness, improve response protocols, and strengthen interagency coordination.

The Govt and Law Enforcement Training on Trafficking segment is estimated to be between $21 and $33m as of YE 2024 and is projected to grow at a 37.8% CAGR to $143m - $224m by 2030. The primary growth driver is pressure on government agencies to combat rising human trafficking case volumes.

There is a push for standardized, tech-enabled training across borders as demonstrated by agreements like Interpol's I-GRIP program. In addition, funding increases (e.g., $35M growth for counter-trafficking in 2023 from the DOJ) signal growing investment in capacity-building tech.

37.8%
5-Year CAGR

$123m
Est. 2030 Market Size



Segment Analysis

Counter Trafficking Training

Corporate & For-Profit

Corporations and businesses use counter-trafficking training technology primarily through e-learning platforms, compliance software, and interactive modules. These tools educate employees—especially in supply chain, procurement, and HR—on how to spot signs of trafficking, conduct ethical sourcing, and report suspicious activity.

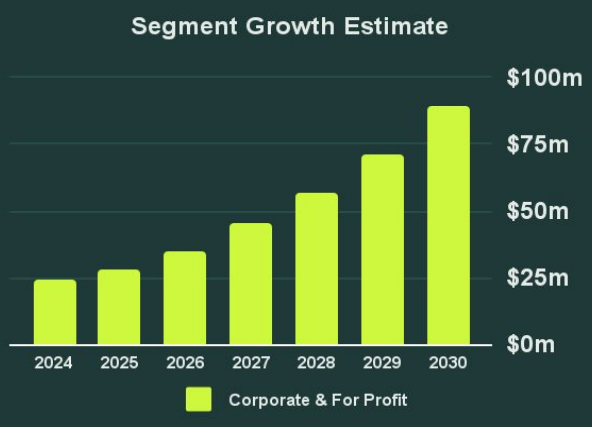
Training is often integrated into broader ESG or human rights programs. Some platforms offer sector-specific scenarios (e.g., hospitality, manufacturing), while others include certifications or audits to track compliance. The goal is to reduce trafficking risks in operations and supply chains through awareness and accountability.

The Corporate Training on Trafficking segment is estimated to be between $16m and $33m as of YE 2024 and is projected to grow at a 24.1% CAGR to $59 - $119m by 2030.

The primary growth driver is ESG Compliance Pressure from various corporate ESG mandates (e.g., UK Modern Slavery Act) that compel firms to train staff on trafficking risks, boosting e-learning demand. In addition, reputational risk related to high-profile scandals (e.g., forced labor in apparel supply chains) drives proactive adoption to protect brand value. Expect new financial incentives from legislation related to ethical hiring practices, supply chains, and codes of conduct to arrive in the next five years. Lastly, workforce expansion, especially a remote workforce, increases the need for scalable, digital training solutions across industries.

24.1%
5-Year CAGR

$89m
Est. 2030 Market Size



Segment Analysis

Counter Trafficking Training

School Based

School-based counter-trafficking training technology includes digital curricula, interactive e-learning modules, and mobile apps designed for students, teachers, and counselors.

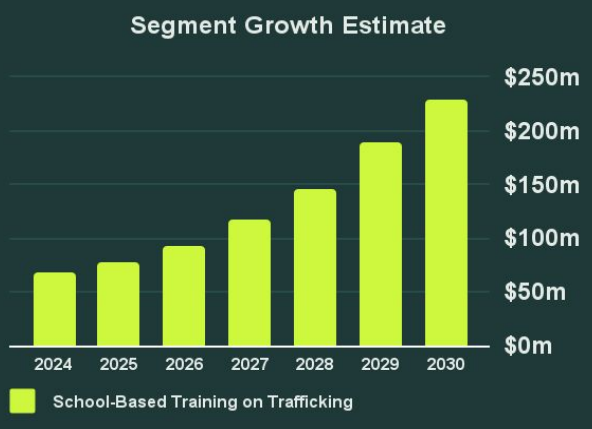
These tools focus on prevention by raising awareness of grooming tactics, online exploitation, and safe internet use. Some programs use age-appropriate videos, quizzes, and gamified lessons to engage students, while educators receive training via online platforms to identify and respond to red flags. Technology also supports anonymous reporting and connects students to trusted resources, aiming to build resilience and promote early intervention.

The school-based training on the trafficking segment is estimated to be between $37m and $86m as of YE 2024 and is projected to grow at a 22.4% CAGR to $124m -$290m by 2030. The primary growth driver for this segment is new legislation passed in Texas and California, which mandates trafficking training.

Additionally, a post-pandemic focus on social-emotional learning opens budgets for interactive modules addressing trafficking risks. Lastly, NGO Partnerships like ECPAT-USA expand school adoption of tech-driven awareness programs.

22.4%
5-Year CAGR

$228m
Est. 2030 Market Size



Segment Analysis

Counter Trafficking Training

Methodology

We used a bottoms up and a top down approach to estimate the Counter-Trafficking training market segments. For the School-based training segment, we benchmarked our ARR figures against the players in the market like Lisa Strohman and Altus. We used the total number of children between the ages of 9 and 15 to approximate the customer pool. We used a variable penetration rate that is a conservative estimate based on qualitative analysis.

For the Government & Law enforcement and the Corporate Counter-Trafficking training segments, we began our estimate with a large estimate or market and systematically narrowed down. For The G&L segment, we identified the total spending on police officers. Then we estimated the percent spent on training and the percent spent on technology by benchmarking against several different law enforcement agencies and departments. Finally, we estimated the percent applicable to counter-trafficking activities by cross referencing the average case load of human trafficking cases with the number of arrests/human trafficking cases in 2023. For the Corp. segment, we sourced the total spend on training from statistics databases, then estimated that 80% is focused on corporations, excluding startups, NGOs and non-profits. We conservatively estimated the technology spend and percent applicable to CHT based on qualitative analysis and proprietary Eagle research.

Segment	ARR	Potential Customers	TAM	Penetration	Segment Estimate
School Based	$60	41.9m	$2,467m	1.5% - 3.5%	$37m - $86m

Segment	Total spend on Police	% spent on training	% spent on technology	% applicable to CHT	Segment Estimate
Govt. & Law Enforcement	$206,800m	9.6%	30%	0.35% - 0.55%	$21m - $33m

Segment	Total spend on training	% allocated corporations	% spent on technology	% applicable to CHT	Segment Estimate
Corporate	$101,800m	80%	20%	0.1% - 0.2%	$65m - $162m

Segment Analysis

Counter Trafficking Training

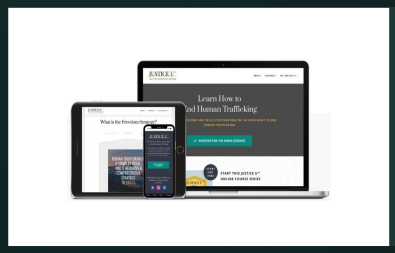
JUSTICE U

Case Study • JusticeU

JusticeU is educating and enabling organizations like hospitals to Fight Trafficking



The average sex trafficking victim interacts with healthcare 18 times before being identified



Altus, through JusticeU, offers expert counter-trafficking education

Orgs like hospitals experience up to a 100x increase in identification effectiveness

- Before Altus training, a hospital averaged 2-3 victim ID's each year
- Altus trained over 6000 Healthcare professionals
- Successful victim ID's skyrocketed from 2-3 into the hundreds

Segment Analysis

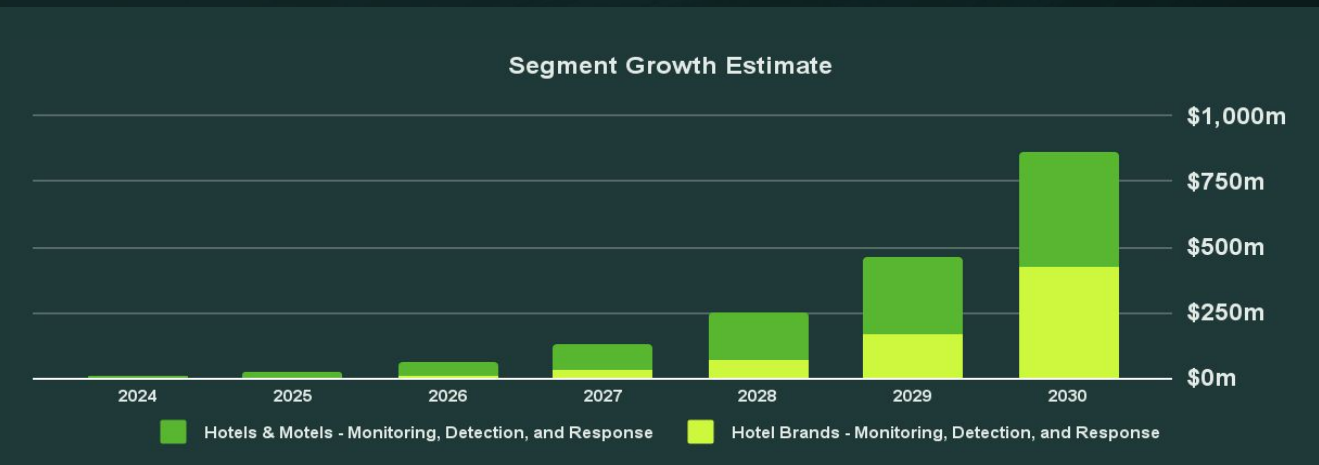
Monitoring, Detection, & Response in Hospitality

Hotels must play a significant role in combating human trafficking, as they are hotspots for victim exploitation and a nexus for trafficking networks. Implementing effective monitoring, detection, and response strategies is crucial for hotels to proactively address this crime.

Monitoring, detection and response in hospitality refers to the use of technological solutions that help hotels and motels prevent human trafficking and protect potential victims. Solutions vary tremendously in form and function. For instance, record keeping solutions use ID scanning technology and enhanced security systems to help hotels maintain accurate guest records for potential investigations. AI-powered systems can analyze booking data and other digital signals to identify patterns indicative of trafficking. Facial recognition technology can help identify missing persons or known trafficking victims. Enhanced security camera systems combined with AI and tailored software can provide crucial evidence for investigations, and more importantly, can help prevent trafficking interactions before they occur.

113.1%
5-Year CAGR

$861m
Est. 2030 Market Size



Segment Analysis

Monitoring, Detection, & Response in Hospitality

Hotels Enterprises

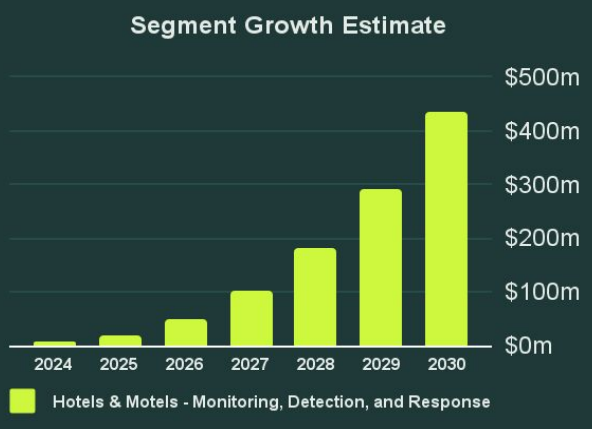
Hotel enterprises use counter-human trafficking technology to implement consistent monitoring, detection, and response protocols across franchise locations. They invest in enterprise-wide platforms that use AI and data analytics to flag trafficking risks based on patterns in bookings, payment methods, and guest behavior. Hospitality enterprises deploy centralized training systems to educate staff globally and ensure compliance with anti-trafficking standards. Corporate security teams monitor incident reports and coordinate responses across regions, often integrating third-party tools for risk intelligence.

The market segment for Monitoring, Detection, and Response in Hotel Enterprises is estimated to be between $1.0m and $2.6m as of YE 2024 and is projected to grow at a 153.2% CAGR to $256m - $682m by 2030.

The primary growth driver is Legal Liability, where new precedents in TVPRA lawsuits (e.g., against Hilton, 2023) incentivize hotels to adopt tech to mitigate trafficking risks. Further, industry partnerships like Marriott's training with ECPAT-USA expand tech use for monitoring and reporting. Finally, social pressure, both corporate pressure and consumer pressure, for ethical travel drives hotels to invest in detection systems.

153.2%
5-Year CAGR

$426m
Est. 2030 Market Size



Segment Analysis

Monitoring, Detection, & Response in Hospitality

Individual Hotels, Motels & Properties

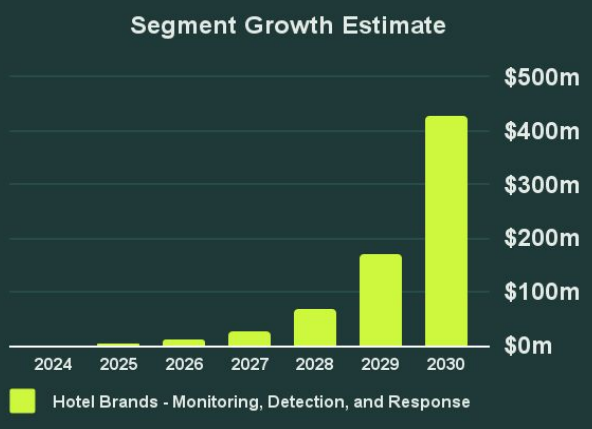
Hotels & motels use counter-human trafficking technology for monitoring, detection, and response through AI-powered surveillance, staff training apps, and incident reporting tools. AI systems analyze booking patterns, guest behavior, and Wi-Fi activity to flag suspicious activity. Mobile training apps help staff recognize signs of trafficking, especially in housekeeping and front desk roles. Digital reporting platforms enable real-time alerts and coordination with law enforcement or corporate security teams. These technologies aim to proactively identify risks, ensure staff readiness, and support rapid, discreet intervention.

The market segment for Monitoring, Detection, and Response within individual hotels, motels & properties is estimated to be between $5m and $10m as of YE 2024 and is projected to grow at a 96.4% CAGR to $290m - $580m by 2030.

The primary growth driver for the segment is Legal Liability, where new precedents in TVPRA lawsuits (e.g., against Hilton, 2023) incentivize hotels to adopt tech to mitigate trafficking risks. However, the small size of individual hotels and individual properties within the hospitality industry suggests that such players will be slower to adopt counter-trafficking technology. Though social pressure, both corporate and consumer, for ethical travel still exists, small hospitality players are much more insulated than larger corporations.

96.4%
5-Year CAGR

$435m
Est. 2030 Market Size



Segment Analysis

Monitoring, Detection, & Response in Hospitality

Methodology

We used a bottoms up approach to estimate the Monitoring, Detection and Response market segments. For the both subsegments, we benchmarked ARR figures internally against Eagle Venture Fund's proprietary research. We used the total number of hotel corporations and hotel properties to approximate the customer pool. We chose not to focus on offerings like VRBO and AirBNB though we are currently conducting more in depth-analysis on these entities. We used a variable penetration rate that is a conservative estimate based on internal benchmarking and qualitative analysis - key assumption: smaller hotel firms or individual properties are much slower to adopt than corporations.

Segment	ARR	Potential Customers	TAM	Penetration	Segment Estimate
Hotel Corporations	$300,000	216	$65m	1.5% - 4.0%	$1.0m - $2.6m
Small Hotels & Motels	$90,000	112,400	$10,116m	0.05% - 0.1%	$5.0 - $10m

Segment Analysis

Monitoring, Detection, & Response in Hospitality

HOTELSHIELD

Case Study • HotelShield

HotelShield is Solving Human Trafficking in Hospitality

Red Roof | $29 million

DAYS INN | $25 million

RAMADA BY WYNDHAM | $38 million

→ With a lack of CHT protocols 15+ hotel brands are in court over human trafficking



→ Super Bowl LIX pilot demonstrates HotelShield's traction

5 name brand hotel locations implemented the best practices during SB LIX

HotelShield supplies game changing Tech & Guidance to Hotels

Industry standard best practices

- → Train your team
- → Watch the door
- → Monitor the digital world
- → Watch the register
- → Respond effectively

Along with the proprietary technology Partners to execute

Segment Analysis

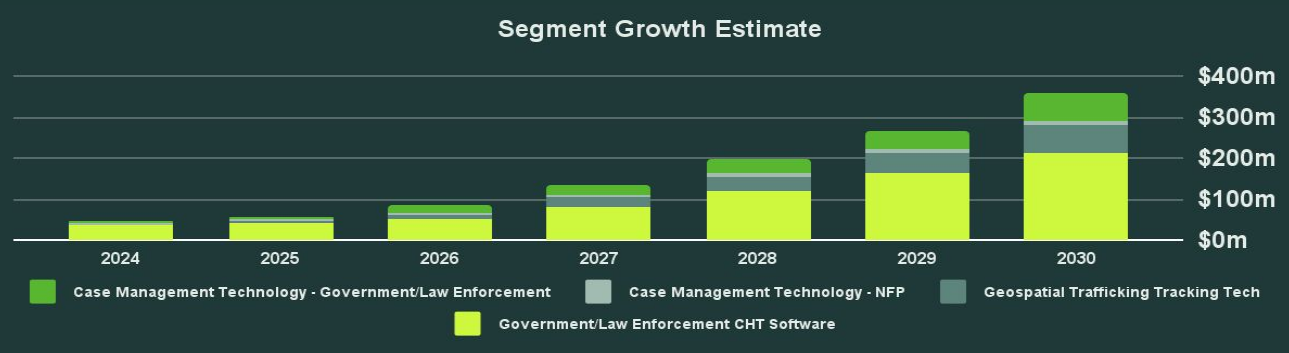
Law Enforcement Counter Human Trafficking Technology

Law Enforcement has been and will continue to be one of the primary purveyors of justice in the fight against human trafficking. Technology can greatly aid several aspects of law enforcement's efforts against human trafficking. The most relevant aspects are intel quality, intel volume, intel velocity, case management competency, and communication. If a law enforcement agency can be strong in these five areas, it suggests they will be more effective in prevention and response.

Law Enforcement Counter Trafficking Technology can tremendously enhance intelligence or provide substantial administrative benefits. On the intelligence side, technology can range from proprietary software that targets trafficking patterns, to AI-powered systems with facial recognition, to human trafficking databases. Intel - whether a match from visual processing software or intercepted communications - can make the difference in a rescue attempt or be the key to preventing a trafficking interaction. On the administrative side, data-sharing systems enable cross-agency collaboration, and case management software streamlines workflows. These technologies enhance intelligence gathering, speed up operations, and improve coordination across jurisdictions.

40.3%
5-Year CAGR

$356m
Est. 2030 Market Size



Segment Analysis

Law Enforcement Counter Human Trafficking Technology

Law Enforcement Counter Trafficking Intelligence Software

Law enforcement counter-trafficking intelligence software focuses on identifying trafficking networks, patterns, and high-risk activity. These platforms aggregate data from online ads, social media, financial transactions, travel records, and law enforcement databases.

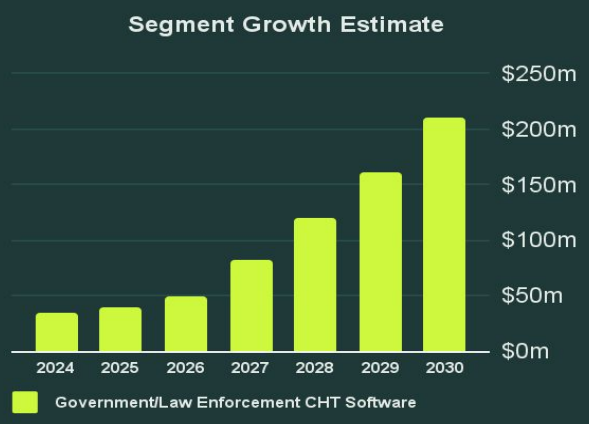
AI and machine learning tools detect suspicious behavior, map relationships between suspects, and flag potential victims. The software enables real-time insights, pattern recognition, and predictive analysis, helping law enforcement proactively disrupt trafficking operations.

The Law enforcement counter-trafficking intelligence software is estimated to be between $27m - $42m as of YE 2024 and is projected to grow at a 34.9% CAGR to $210m by 2030.

The primary growth driver for this segment is a surge in online trafficking (e.g., a study of 133 random trafficking cases revealed that over 70% of victims were recruited on Facebook and Instagram)[1]. The surge demands tech/digital solutions. As technology's capability improves dramatically, law enforcement agencies should feel more social pressure, either directly through lobbyists or through legislative bodies, to incorporate it into operations. Finally, law enforcement agencies' immense budgets (e.g., $20B market per MarketsandMarkets)[2] provide the funds needed for trafficking-specific software.

34.9%
5-Year CAGR

$210m
Est. 2030 Market Size



1) Trafficking Institute - Federal HT Report
2) Global law enforcement market

Segment Analysis

Law Enforcement Counter Human Trafficking Technology

Geospatial Trafficking Technology

This segment is a human trafficking specific subset of the substantial geospatial tracking technology in place already; primary users include government organizations, law enforcement, and satellite imaging firms. It helps identify trafficking routes, hotspots, and transit patterns across borders or within cities.

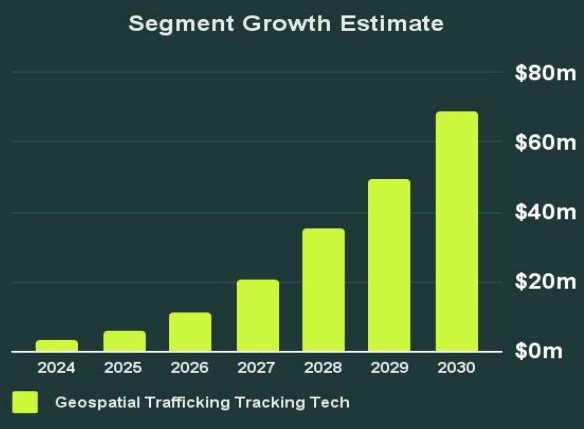
Agencies use this technology to monitor suspicious movement of individuals or vehicles, track known offenders, and analyze high-risk zones such as ports, highways, or remote worksites. When combined with other data sources, geospatial tools support real-time surveillance, situational awareness, and strategic deployment of resources for interdiction and rescue efforts.

The Geospatial Trafficking Tracking Tech segment is estimated to be between $2m and $4m as of YE 2024 and is projected to grow at a 67.6% CAGR to $46m - $192m by 2030. The primary growth driver is increasing satellite accessibility, as declining costs of geospatial data make trafficking tracking viable for more users.

Further, homeland security interests increase border security needs, which directly increases the demand for route-mapping tech or other forms of tracking tech.

67.6%
5-Year CAGR

$69m
Est. 2030 Market Size



Segment Analysis

Law Enforcement Counter Human Trafficking Technology

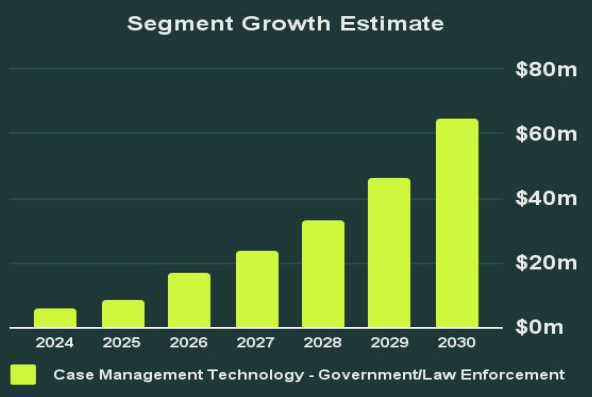
Counter Trafficking Case Management Technology

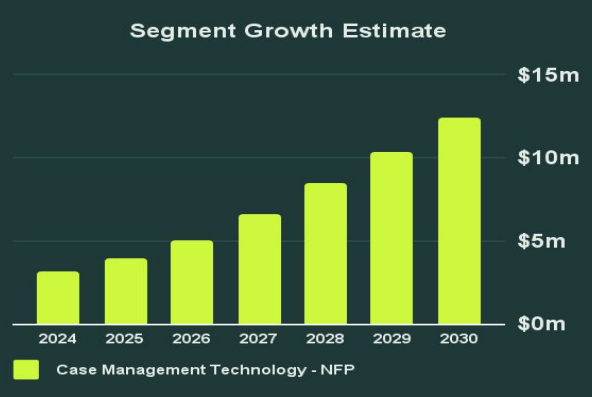
Counter-trafficking case management software helps agencies track victims, manage investigations, and coordinate services. It stores case data securely, supports victim-centered workflows, and enables documentation of legal, medical, and social support actions. The software improves efficiency for individual agencies by organizing complex cases and reducing duplication. It also enables inter-agency collaboration through data-sharing features, standardized reporting, and permission-based access, allowing law enforcement, NGOs, and social services to work together more effectively. This improves outcomes, reduces gaps in care, and strengthens coordinated responses.

The Counter trafficking case management segment is estimated to be between $4m and $11m as of YE 2024 and is projected to grow at a 43.7% CAGR to $42m - $94m by 2030. The primary growth driver for this segment is an anticipated surge in trafficking specific task forces, agencies, and organizations. In addition, case management suppliers are beginning to provide trafficking specific iterations of their product (i.e. CaseClosed human trafficking solutions) that should directly lead to an increase in adoption rates.

43.7%
5-Year CAGR

$67m (combined)
Est. 2030 Market Size





Segment Analysis

Law Enforcement Counter Human Trafficking Technology

Methodology

We used a bottoms up and a top down approach to estimate the Law Enforcement Counter-Trafficking technology market segments. For the Law Enforcement CHT Intelligence software segment, we used a top down analysis. We began with the total annual spend on police officers across the US. Then we estimated the percent spent on technology/software by benchmarking against several different law enforcement agencies and departments. Finally, we estimated the percent applicable to counter-trafficking activities by cross referencing the average case load of human trafficking cases with the number of arrests/human trafficking cases in 2023.

For the Geospatial Tracking Technology, we used a top down analysis. We began with the whole Geospatial mapping market by using the industry report for NAICS Code {NEED}. We then estimated the share of that market belonging to Government, Law enforcement, and NGO's by benchmarking against labor statistics data [REVISIT]. Finally, we assigned a conservative estimate to the percent applicable to counter-trafficking activities based on proprietary research and analysis.

For the Case Management Software segment, we used a bottoms up analysis that combined law enforcement software and non profit software. For law enforcement strictly, we estimated the ARR for case management software by benchmarking against known players like CaseClosed and Kasware. We determined the portion of those costs applicable to counter trafficking activities by cross referencing the average case load of human trafficking cases with the number of arrests/human trafficking cases in 2023. We estimated the total potential customers to be all law enforcement officers in the US according to labor statistics.

Finally, we assumed a high variable penetration rate since most law enforcement agencies actively use case management software. For non profit case management technology, we estimated ARR by benchmarking against known players who offer solutions to non profits. Then we estimated the total number of counter trafficking workers by referencing the social services industry, NAICS code [NEED]. Finally, we estimated a low-to-mid variable penetration rate based on industry research.

Segment Analysis

Law Enforcement Counter Human Trafficking Technology

Methodology

Segment	Total spend on Police	% spent on software	% applicable to CHT	Segment Estimate
Government Intel Tech	$206,800m	3.71%	0.35% - 0.55%	$27m - $42m

Segment	Geospatial Total Market	% NGO's, NFPs, Gov.	% applicable to CHT	Segment Estimate
Geospatial Tech	$13,800m	9.6%	0.1% - 0.2%	$2m - $4m

Segment	ARR	# potential users	TAM	Penetration	Segment Estimate
Case Mgmt. Tech (NFP)	$720	17,475	$13m	10% - 40%	$1m - $5m
Case Mgmt. Tech (Gov)	$11	738,959	$8m	40% - 80%	$3m - $6m

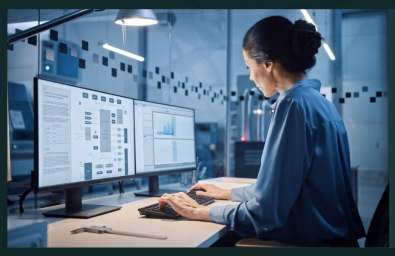
Segment Analysis

Law Enforcement Counter Human Trafficking Technology

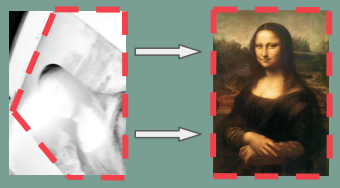
DejaVuAI

Case Study • DejaVu AI

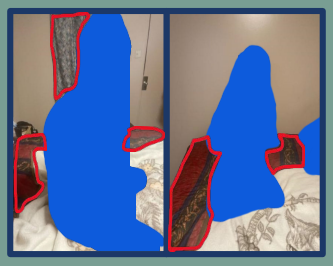
DejaVu AI is providing Law Enforcement with Breakthroughs in Pattern Recognition



Law Enforcement has unmatched access to trafficking data but struggle to leverage it



DejaVu AI has developed market disrupting pattern recognition tech



With their tech, it took DejaVu AI 22 Minutes to find these girls in an active trafficking encounter

Segment Analysis

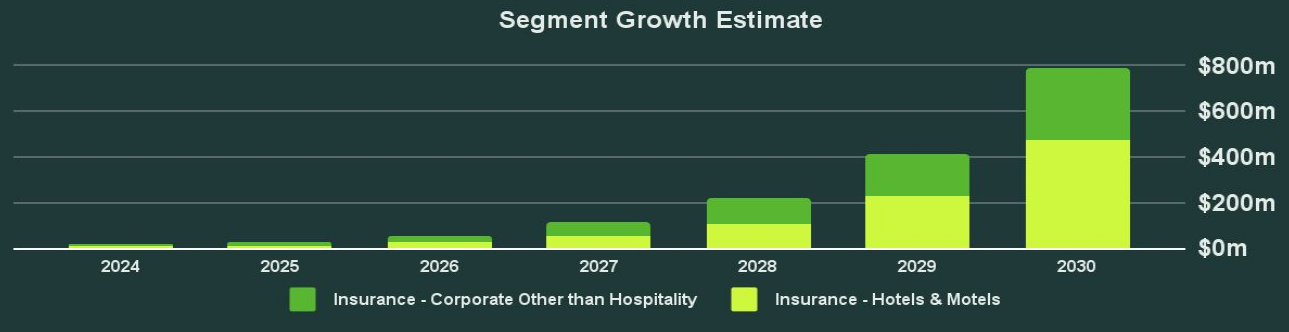
Trafficking Insurance

Insurance transfers the risk of financial loss from an individual or business to an insurance company. In recent years, the risk of incurring financial loss as a result of human trafficking has begun to affect more parties including businesses. For example, recent court rulings have placed liability on hotels that demonstrate negligence in human trafficking encounters, while non-compliance with ethics regulations can result in fines for businesses. Historically, insurance litigation for trafficking lawsuits has taken place under commercial general liability policies. In the coming years, however, expect to see policies specifically written to cover human trafficking. Though still incredibly nascent, the counter trafficking insurance segment is set to rapidly develop over the next few years. Businesses - especially those in hospitality and those with overseas supply chains - will look to mitigate their risk exposure through trafficking insurance.

Counter-trafficking insurance tech refers to digital tools and platforms used by insurers to assess, mitigate, and manage human trafficking risks within insured entities, particularly in high-risk industries like manufacturing, logistics, and hospitality. These technologies may include automated risk assessments, supply chain transparency tools, and ESG data analytics that flag potential trafficking indicators. Some platforms integrate audits, incident reporting, and compliance tracking to help policyholders meet anti-trafficking standards. For insurers, this tech supports underwriting decisions, reduces liability exposure, and aligns coverage with ethical risk management practices.

90.6%
5-Year CAGR

$788m
Est. 2030 Market Size



Segment Analysis

Trafficking Insurance

Insurance • Corporate other than Hospitality

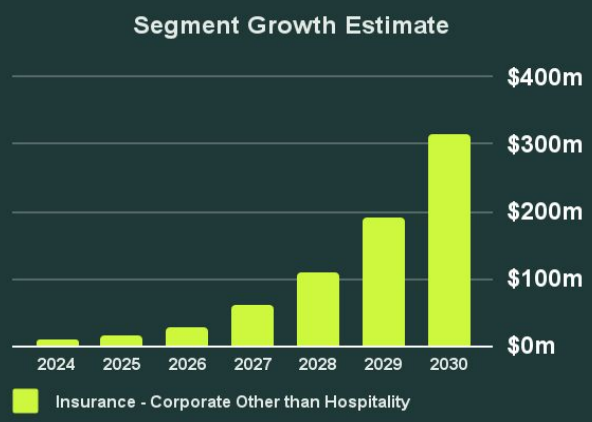
For corporations outside hospitality, insurance tech emphasizes supply chain risk assessment and third-party due diligence. Platforms use automation and data analytics to evaluate vendors for trafficking risks, flag unethical labor practices, and monitor compliance with anti-trafficking regulations. These tools are especially relevant in manufacturing, agriculture, and logistics, where labor exploitation is more common. For insurers, this tech enhances risk visibility and helps tailor coverage based on a company's trafficking exposure and prevention measures.

The Insurance - Corporate Other than Hospitality segment is estimated to be between $6m and $13m as of YE 2024 and is projected to grow at a 79.1% CAGR to $210m and $419m by 2030.

The primary growth driver for this segment is an increase in regulatory fines for trafficking violations (e.g., we estimate at least $750 million over past 5 years)[1], which will drive corporations toward counter-human trafficking tech. Supply chain scrutiny push corporate firms to insure against trafficking risks, boosting tech demand in insurance companies.

79.1%
5-Year CAGR

$314m
Est. 2030 Market Size



1) Deutsche Bank $150M Settlement, $158.8M+ settlements/verdicts, JPMC $290m Settlement, Capture of some of the $5B+ AML Fines in past 5 years

Segment Analysis

Trafficking Insurance

Insurance • Hospitality Industry

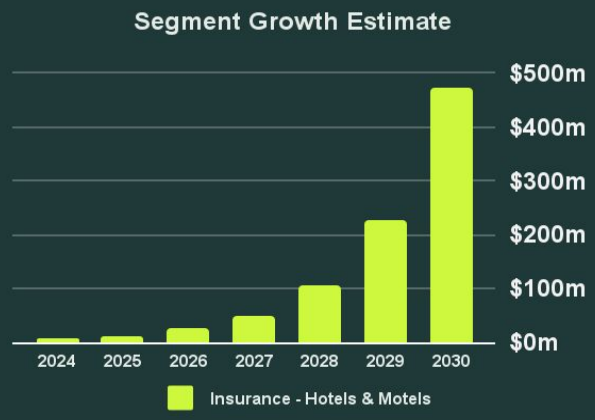
For hospitality firms, counter-trafficking insurance tech focuses on monitoring and mitigating trafficking risks on hotel properties. Tools may include staff training compliance trackers, AI-driven incident reporting systems, and guest behavior analytics that align with underwriting criteria. These tools help hospitality brands demonstrate due diligence, reduce reputational and legal exposure, and align with ESG expectations.

The Insurance - Hospitality Industry segment is estimated to be between $5m and $9m as of YE 2024 and is projected to grow at a 102.3% CAGR to $355m - $592m by 2030.

The primary growth driver for this segment is impending litigation costs related to increasing trafficking-related claims in hospitality (e.g., $10M+ settlements), pushing insurers towards tech adoption. Further, insurers' shift to proactive mitigation (e.g., HUB International's 2025 guide) supports tech-linked policies. Finally, insurers adopting trafficking tech gain an edge in a $50B hospitality insurance market.

102.3%
5-Year CAGR

$474m
Est. 2030 Market Size



Segment Analysis

Trafficking Insurance

Methodology

We used a bottoms up and a top down approach to estimate the Trafficking insurance market segments. For the Insurance - Hospitality segment, we began with the total size of the Hospitality market in the US. Then we estimated both the percent spent on insurance in Hospitality and the percent spent on tech in insurance by benchmarking against figures found in industry reports and analysing key trends. We determined that hospitality has an unusually high amount of use cases for counter trafficking insurance. Thus, we used a moderate variable rate as our estimate of the percent applicable to human trafficking activities.

For the Insurance - Other than Hospitality segment, we began with the total US insurance market size based on all gross premiums written (minus hospitality). We then narrowed down to the size of the Commercial General Liability (CGL) insurance market in the US, aligning our estimate with data figures for CGL gross premiums written. We then narrowed down estimates further by applying data-driven percentages to

Segment	Total Market: Hospitality	% spent on insurance	% spent on technology	% applicable to CHT	Segment Estimate
Insurance - Hotels & Motels	$231,100m	1.71%	17.5%	0.75% - 1.25%	$5m - $9m

Segment	Market: CGL Insurance	% pertaining to bodily injury	% spent on technology	% applicable to CHT	Segment Estimate
Corporate Insurance - Not Hospitality	$181,260m	20.00%	17.5%	0.1% - 0.2%	$6m - $13m

Segment Analysis

Supply Chain Transparency

Supply chain social auditing technology uses digital tools to assess labor conditions, human rights practices, and compliance within global supply chains. It includes mobile survey apps, remote worker interviews, blockchain for traceability, and AI-driven risk analytics.

These platforms help auditors gather real-time data, identify red flags like forced labor, and generate standardized reports. The technology improves audit accuracy, reduces fraud, and enables continuous monitoring, helping companies and auditors detect and address trafficking and labor exploitation more effectively.

The Supply Chain Auditing Tech segment is estimated to be between $17m and $33m as of YE 2024 and is projected to grow at a 36.9% CAGR to $109m - $218m by 2030.

The primary growth driver is new Labor Laws, such as Germany's Supply Chain Act (2023), which mandate auditing and tracking supply chains, driving tech adoption across industries. Further, Consumer Pressure for ethical sourcing (e.g., 66% of consumers prefer sustainable brands, Nielsen 2023) pushes firms to invest in tech options.

Finally, growth in supply chain transparency tech (e.g., IBM's Food Trust) supports tech trafficking audits.

36.9%
5-Year CAGR

$163m
Est. 2030 Market Size



Segment Analysis

Supply Chain Transparency

Methodology

We used a bottoms up approach to estimate the Supply Chain Transparency market segment. Overall, we used SMETA audits as a proxy for the whole market. We estimated an ARR of $3500 - $7500 with a midpoint of $5500 based on publicly sourced data for SMETA Audits, which are the industry leading supply chain transparency audits in the US.

Using NAICS database figures, we estimated about 600,000 potential customers for SMETA audits. We determined a relatively low variable penetration rate benchmarked against current SMETA audit numbers; we estimate about 4400 audits happen annually based on available data from Sedex.

Segment	ARR	# potential users	TAM	Penetration	Segment Estimate
Supply Chain Transparency	$5500	600,000	$3,300m	0.5% - 1%	$17m - $33m

Segment Analysis

Supply Chain Transparency

Evidencity

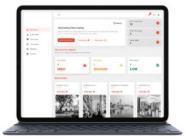
Case Study • Evidencity

Evidencity is showing the immense gap in Supply Chain Transparency for S&P 500



Over 69% of businesses lack adequate supply chain transparency[1]

RiskSignal
&
RiskSolve



Evidencity reveals opaque and unethical supply chains globally



Evidencity has found more than 280,000 mining slaves, linked to 105 S&P 500 firms

Segment Analysis

Know Your Customer/Anti Money Laundering

Labor & Sex Trafficking Add-ons

KYC/AML labor and sex trafficking add-ons enhance traditional financial compliance tools by integrating trafficking-specific risk indicators. These features analyze transaction patterns, customer profiles, and geographic data to flag suspicious activity linked to forced labor or sex trafficking, such as unusual payment flows, use of prepaid cards, or high-risk merchant categories. They may also cross-reference law enforcement watchlists or known trafficking hotspots.

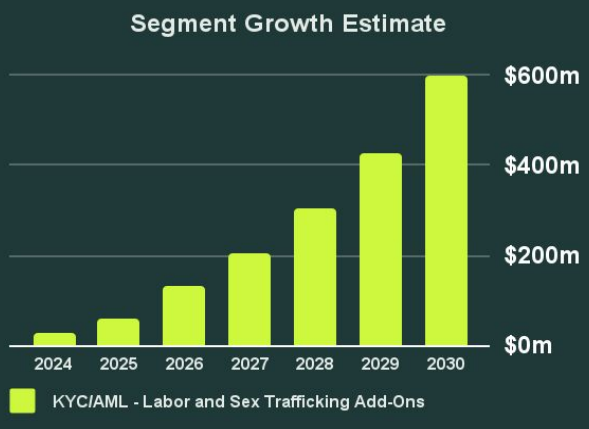
These add-ons help financial institutions identify, investigate, and report trafficking-related crimes more effectively within their existing compliance frameworks.

The KYC/AML - Labor and Sex Trafficking Add-Ons segment is estimated to be between $18m and $36m as of YE 2024 and is projected to grow at a 67.4% CAGR to $398m - $797m by 2030.

The primary growth drivers come from increasing regulatory pressure, demonstrated by FinCEN's 2024 trafficking focus and the EU's 6th AML Directive mandate. Further, fines and penalties of over $22B for AML violations (Enzuz, 2024) push banks to invest in trafficking-specific tools.[1] Finally, AI and blockchain integration (e.g., Oracle's 2024 AML suite) enable precise trafficking detection, growing the market.

67.4%
5-Year CAGR

$598m
Est. 2030 Market Size



1) Enzuzo - Biggest AML Fines

Segment Analysis

KYC/AML • Labor & Sex Trafficking Add-ons

Methodology

We used a top-down approach to estimate the KYC/AML - Labor and Sex Trafficking Addons market segment. We began with the whole KYC/AML market size.

We assigned the percent applicable to human trafficking by cross referencing industry reports with money laundering datasets, estimating a moderate variable rate based on the pervasiveness of illicit cash flows from Human Trafficking.

Segment	Total KYC/AML Market	% applicable to CHT	Segment Estimate
KYC/AML - Labor and Sex Trafficking Add-Ons	$3,615m	0.5% - 1%	$18m - $36m

Segment Analysis

KYC/AML • Labor & Sex Trafficking Add-ons

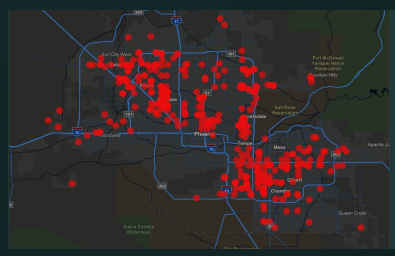
DARK WATCH

Case Study • DarkWatch

Dark Watch is leading the way on Non-Compliance Risk Detection



→ AML/KYC penalties put non-compliant companies at risk of receiving $ Billions in fines



→ DarkWatch has mapped 32,000 brothels run by 200 cartels, helping companies determine if they are doing business with cartels.

By detecting illicit activity in real-time, DarkWatch mitigates these risks

→ Dark Watch Scans Strengthen AML Compliance

→ Scans reveal complex money laundering and fraud schemes

→ Patent-pending Web Scraping leads to Less False Positives

→ Dark Watch eliminates Risk with Precision Scanning

Segment Analysis

Healthcare Screening Tools

Counter-trafficking healthcare screening tools are digital or paper-based systems used by medical professionals to identify potential trafficking victims during clinical visits.

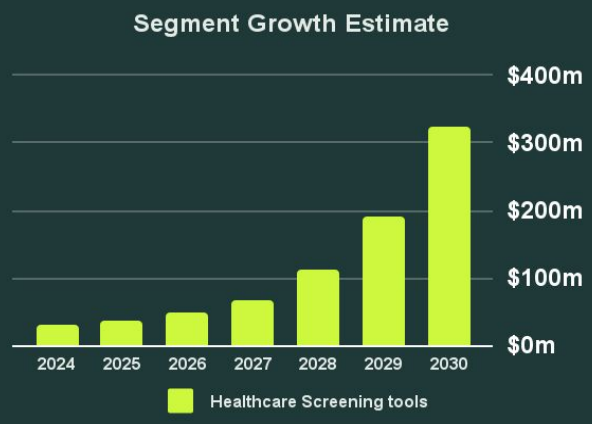
These tools include risk assessment questionnaires, electronic health record (EHR) alerts, and symptom checklists tailored to signs of labor or sex trafficking. Some platforms offer decision support, guiding providers through trauma-informed responses and referral pathways. They help healthcare workers detect red flags early, ensure appropriate care, and connect victims to support services, all while maintaining patient safety and confidentiality.

The Healthcare Screening tools segment is estimated to be between $21m and $42m as of YE 2024 and is projected to grow at a 47.5% CAGR to $341m - $681m by 2030.

The primary growth driver is a demand for EHR (electronic health record) integration, where healthcare IT growth enables seamless addition of trafficking tools to electronic records. Further, COVID-19 spurred a higher level of scrutiny of public health, with healthcare firms heavily emphasizing social factors and demands that will drive tech investment.

47.5%
5-Year CAGR

$325m
Est. 2030 Market Size



Segment Analysis

Healthcare Screening Tools

Methodology

We used a top-down approach to estimate the Healthcare screening tools market segment. We began with the two distinct but related high level figures: the Electronic Medical Record (EMR) market and the total Healthcare Training costs.

We estimated that 10% of the EMR market consists of data analysis and patient screening tools, while estimating that 12% of training costs are directed toward specialized, non-clinical purposes. We then estimated the percent applicable to counter-trafficking with moderate variable rate based on signs of early adoption by large healthcare providers across the US.

Segment	Market: EMR in US	% data analysis	% applicable to CHT	Segment Estimate
HealthCare Screening tools	$19,400m	10%	0.5% - 1%	$21m - $42m
	Market: Health training costs	% spent on special/tech		
	$18,816m	12%		

Counter-Human Trafficking
Technology Companies by Category

Market Map

→ Safe Digital World

Harm Block · Net Nanny · REACT · techless · GuardianLock · angelQ
bark · Qustodio · GameSafe · norton Family · kaspersky Safe Kids

→ Tech Enabled CHT Training

AnnieCannons · JUSTICE U · Association of Certified Financial Crime Specialists · NURSES UNITED AGAINST HUMAN TRAFFICKING

→ Monitoring, Detection, and Response in Hospitality

HOTEL SHIELD · DARK WATCH

→ Law Enforcement Counter Trafficking Technology

THORN · MARINUS ANALYTICS · veritone · Cellebrite · Implicit Good · DejaVuAI · TRUEPATH VISION
Graylark · GeoSpy · SPOTLIGHT · THE UNIVERSITY OF ALABAMA · LUMYX · Geogentia

→ KYC/AML • Labor and Sex Trafficking Add-Ons

LexisNexis · DARK WATCH · Thomson Reuters · THOMSON REUTERS Special Services, LLC · DARKBLUE
fiserv. · VERAFIN · Palantir · SAYARI

→ Supply Chain Transparency

Ulula · FRDM · EXIGER · Evidencity · OWL AI · resilinc · THOMSON REUTERS Special Services, LLC
DARKBLUE · ERM · SAYARI · TRANSPARENTEM · Panjiva · Aitana · KHARON

→ Healthcare & Tools

ALTUS · Allies Against Slavery · Patient Sortal · NURSES UNITED AGAINST HUMAN TRAFFICKING

→ Job Placement for Vulnerable Populations and Survivors

VEROSKILLS · ArenaCX · TURAS

→ Vulnerable Population Care

samaritan · Coming Home · Your Case Plan · UpFrom · Polaris

Appendix

Resources

→ NASDAQ: Human Trafficking: A Humanitarian Crisis
→ 2024 Trafficking in Persons Report
→ Based on Shared Hope's Fact Sheet: Trafficking Victims Protection Reauthorization Acts (TVPRA)
→ Counter Trafficking Prosecution Unit
→ According to the 2024 TIP Report
→ Best Hashtags
→ National Criminal Justice Reference System
→ https://www.billtrack50.com/billdetail/.multi-collapse
→ ESRI
→ Strengthening Enforcement of Human Trafficking
→ Decatur hotel ordered to pay $40M for ignoring child sex trafficking
→ Cellebrite donates AI investigative tools to nonprofits to help find missing children faster

EAGLE | FREEDOM FUND II



US Counter-Human Trafficking Technology

Market Analysis

Document V1.3

A first-of-its-kind report analyzing the explosive growth of the U.S. counter-human trafficking technology market — tracking trends, innovations, and investment opportunities across 15 key segments.

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