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[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form 7](#)

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Electronic Security Systems

US Industry Study with Forecasts for **2012 & 2017**

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Demographic & Social Environment.....	5
Demographic Trends	6
Employment Outlook	8
Macroeconomic Environment.....	11
Building Construction Outlook.....	17
Residential Construction	19
Nonresidential Construction.....	22
Building Stock Trends	24
Residential Building Stock	25
Nonresidential Building Stock.....	28
Business Establishment Trends	30
Motor Vehicle Outlook.....	32
Public Safety Environment.....	35
Crime.....	36
Violent Crimes	39
Property Crimes.....	41
Terrorism/Other Nonconventional Crimes..	44
Terrorism	45
Other Nonconventional Crimes	48
Fire	49
Pricing Dynamics	52
Legal & Regulatory Environment.....	55
International Environment.....	58
World Electronic Security Markets.....	59
Foreign Trade.....	61

TECHNOLOGY

General	64
Electronics Overview.....	65
Electronic Components & Systems	67
Information Technology.....	70
Electronic Security Technologies.....	72
Sensors	72
Automatic Identification	75
Systems Integration.....	76
Environmental Control & Building Automation	77

PRODUCTS

General	80
Access Controls.....	83
Card-Based Access Controls	86
Keypad/Combination Access Controls	90

Biometric Access Controls	92
Technologies	95
Suppliers	97
Alarms	98
Local Alarms	101
Smoke Detectors	102
Local Intrusion Alarms	107
Carbon Monoxide Detectors.....	109
Central Station Alarms.....	114
Intrusion	117
Fire & Smoke	118
Suppliers	119
Direct Connect Alarms	120
Fire & Smoke	122
Intrusion	122
Suppliers	123
PERS & Related Alarms	123
Closed-Circuit Television Systems.....	126
Cameras	130
Monitors	133
Recording Equipment	135
Other Components	136
Suppliers.....	138
Contraband Detection Systems	139
Products.....	141
Bulk EDS.....	142
Metal Detectors, X-Rays & Advanced Imaging Systems.....	145
Trace Detectors	147
Suppliers.....	149
Electronic Article Surveillance Systems	150
Products.....	153
Suppliers.....	155
Automotive & Other Electronic Security Products	156
Automotive Security Systems.....	157
Anti-Theft Systems	158
Keyless Entry Systems	159
Vehicle Recovery Systems	160
All Other	161

MARKETS

General	163
Government & Institutional	166
Sector Outlook	166
Electronic Security Outlook	168
Government.....	170
Institutions.....	172

Trade & Distribution	174
Sector Outlook	175
Electronic Security Outlook	177
Industrial	182
Sector Outlook	182
Electronic Security Outlook	187
Air Transport	189
Sector Outlook	191
Electronic Security Outlook	192
Financial Institutions	195
Sector Outlook	196
Electronic Security Outlook	199
Office & Lodging Establishments.....	202
Sector Outlook	202
Electronic Security Outlook	203
Services.....	206
Sector Outlook	207
Electronic Security Outlook	209
Consumer.....	211
Sector Outlook	212
Electronic Security Outlook	214
Residential.....	215
Automotive	219

INDUSTRY STRUCTURE

General	220
Industry Composition	220
Market Share	226
Research & Product Development.....	231
Manufacturing	233
Marketing & Distribution	234
Mergers & Acquisitions.....	237
Cooperative Agreements.....	242

COMPANY PROFILES

American Science and Engineering	248
Analogic Corporation	250
ASSA ABLOY	253
Bosch (Robert) GmbH	259
Brady Corporation	265
Checkpoint Systems.....	267
Danaher Corporation.....	270
DataCard Corporation.....	272
Diebold Incorporated.....	274
Federal Signal.....	278
General Electric	281
Hitachi Limited	288
Honeywell International.....	290

(continued on next page)

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Table of Contents

COMPANY PROFILES

(continued from previous page)

Ingersoll-Rand Company.....	298
Jarden Corporation.....	302
Johnson Controls.....	303
L-1 Identity Solutions.....	306
L-3 Communications.....	312
Matsushita Electric Industrial.....	316
MDI Incorporated.....	320
Motorola Incorporated.....	323
NAPCO Security Systems.....	325
Nortek Incorporated.....	330
OSI Systems.....	333
Royal Philips Electronics.....	338
SANYO Electric.....	340
Schneider Electric.....	342
Science Applications International.....	345
Sielox Incorporated.....	349
Siemens AG.....	352
Smiths Group.....	357
Sony Corporation.....	360
Stanley Works.....	362
Thermo Fisher Scientific.....	366
3M Company.....	368
Tyco International.....	370
United Technologies.....	378
Vicon Industries.....	385
Additional Companies.....	388

10 Motor Vehicle Indicators.....	35
Cht US Crime Rates, 1997-2006.....	39
11 Violent Crime Levels.....	41
12 Property Crime Levels.....	44
13 Terrorism & Other Nonconventional Crimes.....	45
14 Fire Levels & Losses.....	52
Cht World Electronic Security System Market, 2007.....	61
15 US Foreign Trade of Electronic Security Systems.....	63

18 Other Closed-Circuit Television Component Demand.....	138
19 Contraband Detection System Supply & Demand.....	140
20 Contraband Detection System Demand by Type.....	141
Cht Contraband Detection System Demand by Type, 2007.....	142
21 Electronic Article Surveillance System Supply & Demand.....	152
Cht Electronic Article Surveillance System Demand by Type, 2007.....	152
22 Automotive & Other Electronic Security Product Supply & Demand.....	157

TECHNOLOGIES

1 Electronic & Computer Product Shipments.....	67
2 Computer Hardware & Software Demand...	72

PRODUCTS

1 Electronic Security System Supply & Demand.....	82
Cht Electronic Security System Demand by Type, 2007.....	83
2 Electronic Access Control Supply & Demand.....	85
Cht Electronic Access Control Demand by Type, 2007.....	86
3 Card-Based Access Control Demand by Type.....	90
4 Keypad/Combination Access Control Demand.....	92
5 Biometric Access Control Demand by Type.....	95
6 Alarm System Supply & Demand.....	100
Cht Alarm System Demand by Type, 2007.....	101
7 Local Alarm Demand by Type.....	102
8 Smoke Detector Demand by Type.....	105
9 Local Intrusion Alarm Demand.....	109
10 Carbon Monoxide Detector Demand.....	112
11 Central Station Alarm Demand by Type...	117
12 Direct Connect Alarm Demand by Type...	121
13 Personal Emergency Response Service & Related Alarm Demand.....	126
14 Closed-Circuit Television System Supply & Demand.....	129
Cht Closed-Circuit Television System Demand by Component, 2007.....	129
15 Closed-Circuit Television Camera Demand.....	133
16 Closed-Circuit Television Monitor Demand.....	134
17 Closed-Circuit Television Recording Equipment Demand.....	136

MARKETS

1 Electronic Security System Demand by Market.....	165
Cht Electronic Security System Demand by Market, 2007.....	165
2 Government/Institutional Sector Indicators.....	168
3 Government/Institutional Sector Electronic Security Market.....	170
4 Retail Sales.....	177
5 Trade & Distribution Electronic Security Market.....	181
6 Industrial Sector Indicators.....	186
7 Industrial Electronic Security Market.....	189
8 Air Carrier Outlook.....	192
9 Air Transport Electronic Security Market.....	195
10 Financial Sector Indicators.....	199
11 Financial Institutions Electronic Security Market.....	201
12 Office & Lodging Construction Expenditures & Building Space.....	203
13 Office & Lodging Electronic Security Market.....	206
14 Services Sector Indicators.....	209
15 Services Sector Electronic Security Market.....	211
16 Personal Consumption Expenditures.....	213
17 Consumer Electronic Security Market.....	215
18 Residential Electronic Security Market.....	218
19 Consumer Automotive Electronic Security Market.....	219

INDUSTRY STRUCTURE

1 Electronic Security System Sales by Company, 2007.....	224
Cht Electronic Security System Market Share, 2007.....	226
2 Selected Acquisitions & Divestitures.....	239
3 Selected Cooperative Agreements.....	244

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 Population & Households.....	8
2 Employment Outlook.....	10
3 Macroeconomic Indicators.....	16
4 Building Construction Expenditures.....	19
5 Residential Building Construction Expenditures.....	21
6 Nonresidential Building Construction Expenditures.....	24
7 Housing Stock by Type.....	27
8 Nonresidential Building Stock.....	30
9 Business Establishments.....	32

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Growth continues to be driven by a high perceived risk of crime based on widespread media coverage of high profile crimes and the belief that public safety officials are overburdened.

US demand to grow 7.8% annually through 2012

The US electronic security products and systems market is expected to increase 7.8 percent per year to \$15.6 billion in 2012. Growth for electronic security systems continues to be driven by a high perceived risk of crime, despite a long-term trend of falling crime rates. This perception is the result of widespread media coverage of high profile crime events. Additionally, many believe that public safety officials are overburdened so they provide their own supplemental security arrangements. Ongoing technological improvements that enhance the accuracy, ease of use and speed of operation of security systems will also bolster spending, not only by spurring interest in upgrading existing security systems but also by improving market penetration. The falling prices of many high-end electronic security components have further boosted gains by increasing market penetration across a wider base.

Access controls to achieve strongest annual growth

Access controls are expected to achieve the strongest growth through 2012 because of technological innovations that allow them to employ an increasingly sophisticated array of clearance options that are more difficult to forge and are easier to operate. These systems can also effectively replace guards. Additionally, falling prices are making them more accessible to building owners



looking to upgrade from conventional mechanical locks. Advances in access controls will be led by biometric versions, which will grow exponentially over the next decade, reaching \$4.6 billion in 2017. Biometric controls identify users by biological traits such as fingerprint, hand shape or grip, facial features, retinal or iris image, voice and vein patterns. Advances will be driven by the declining costs and improving performance of these systems, and the growing use of biometrics integrated with more conventional access control technologies. Gains will also be spurred by federal government mandates for the addition of biometric controls into its systems.

Gains for contraband detection systems will be significantly below those achieved during the massive expansion between 2002 and 2007, much of which took place in airports following the September 11, 2001 attacks. However, going forward, gains will continue to stem from technological upgrades that allow for more thorough, more precise and faster screening of baggage and passengers. More mature products such as alarms and CCTV will rebound as new housing construction recovers. Additionally, further gains will also be spurred by technological improvements such as wireless connectivity, voice/video alarm verification, digital components, and access via any Internet-capable and text messaging-enabled device.

Sample Text, Table & Chart

MARKETS

Industrial Sector: Electronic Security Outlook

Demand for electronic security products and systems in the industrial sector will continue to grow through 2017, well above the forecast for the overall electronic security market. However, demand is expected to decelerate as well as the overall market by security systems that are more sensitive to the needs of industrial facilities at space, defense and other facilities and private sector deployers of high value security systems advanced contraband detection systems. Advances will be driven by the ongoing shift in this market away from manned security to less labor-intensive access controls, as well as interest in upgrading existing security equipment to digital versions and other higher level of functionality over equipment from previous years.

SAMPLE
TEXT

Because many industrial establishments tend to be staffed around the clock, limiting access by unauthorized employees is often a higher priority than preventing external theft or break-in. This priority has tended to promote demand for access controls, which continued to account for a plurality of total industrial sector electronic security product demand. Access control interest is also growing as systems that incorporate time-clock components come available. Additionally, an increasing share of these systems feature higher value biometric controls as a way of protecting against time-clock fraud as some employees punch in for each other.

Monitoring and surveillance-type products such as alarms and CCTV are well-represented as well. For instance, advanced fire alarm systems are deployed in many industrial settings, especially in industries such as energy and utilities, aerospace and defense, and chemicals where

TABLE V-13

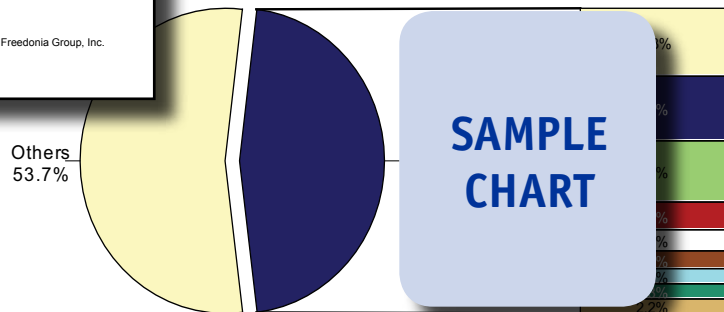
OFFICE & LODGING ELECTRONIC SECURITY MARKET (million dollars)

Item	1997	2002	2007	2012	2017
Office/Lodging Bldg Space (bil sq ft)					2.7
\$ security/000 sq ft space					10
Offices/Lodging Elec Security Market					10
By Type of Establishment:					
Offices					5
Lodging					5
By Product/System:					
Access Controls					10
Alarms					4
CCTV					3
Contraband Detection					0
EAS					6
Other					7
% offices & lodging					7
Electronic Security System Demand	4				100

SAMPLE
TABLE

CHART VI-1

INDUSTRIAL ELECTRONIC SECURITY SYSTEM MARKET SHARE, 2007 (\$10.7 billion)



SAMPLE
CHART

OTHER STUDIES

Private Security Services

This study analyzes the US private security services industry. It presents historical demand data for 1997, 2002 and 2007 and forecasts for 2012 and 2017 by type (e.g., guarding, alarm monitoring, private investigation, armored transport, correctional facilities management, systems integration, consulting, pre-employment screening), end-use (nonresidential, residential), and region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles major players.

#2362 07/2008..... \$4600

World Security Equipment

The global security equipment market is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by product (e.g., access controls and surveillance systems, alarms, locks); market (commercial and industrial, institutional, residential); world region (e.g., Asia/Pacific, North America, Western Europe); and major country. The study also considers market environment factors, details industry composition, evaluates market share and profiles leading competitors.

#2343 05/2008..... \$5900

Waste Management & Remediation Services

US waste management and remediation demand will rise 5.3% yearly through 2012. Waste collection will remain dominant while remediation and material recovery grow the fastest based on more interest in public/environmental safety, brownfield development, waste recycling and material reuse. This study analyzes the \$84.6 billion US waste management and remediation industry, with forecasts for 2012 and 2017 by service, market and region. It also evaluates company market share and profiles major players.

#2327 05/2008..... \$4500

World Major Household Appliances

Global white goods demand will grow 3.1% yearly through 2011. India will lead gains based on low penetration rates and rising living standards. Replacement demand will spur growth in developed areas as users replace broken appliances and trade up for newer models like more efficient "green" types. This study analyzes the 413 million unit world white goods industry, with forecasts for 2011 and 2016 by product, world region and for 25 countries. It also evaluates market share and profiles major players.

#2279 01/2008..... \$5800

Commercial & Residential Cleaning Services

US commercial and residential cleaning service sales will grow 5.3% annually through 2011. Gains will be driven by the shift toward "do-it-for-me" cleaning services in the residential market, and by the outsourcing of noncore functions in the nonresidential market. This study analyzes the \$48.4 billion US contract cleaning service industry, with historical data and forecasts for 2011 and 2016 presented by service, market and region. The study also evaluates company market share and profiles leading players.

#2191 05/2007..... \$4400

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- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

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