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# World Security Equipment

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

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*Developing regions will increasingly have both the need for and means to invest in security products. China, India, Russia and Brazil will record some of the most robust sales increases.*

## Global demand to climb 7.8% yearly through 2012

World demand for security equipment is projected to climb 7.8 percent annually through 2012 to over \$90 billion. The strongest market gains will be registered in developing parts of Asia, Eastern Europe, Africa and the Middle East, and Latin America. Security markets in these areas are, for the most part, underdeveloped, and product demand will be fueled by generally strong economic environments, new business formation and foreign investment activity, increased urbanization (contributing to social tensions and criminal activity), and growing middle and upper class populations. As a result, these developing regions will increasingly have both the need for and means to invest in security products. China, India, Russia and Brazil are forecast to record some of the most robust sales increases. By 2012, China will surpass Japan to become the second largest security equipment market in the world behind the US. Growth is also expected to be strong in lower-volume markets such as Turkey, Indonesia and Israel.

Security product demand in developed parts of the world will expand as well. Sales will be stimulated by largely favorable economic conditions, rising business and personal incomes, renewed strength in building construction spending in the US and Japan, and ongoing concerns about the threat of new terrorist attacks. However, building



construction expenditures are expected to moderate in Western Europe, and the maturity of most security equipment markets in developed areas will constrain future increases in demand.

## Electronic security products to outpace mechanical

Electronic security products will post much stronger sales advances than mechanical security equipment through 2012. New generations of electronic security products have much greater capabilities than locks, safes and other mechanical devices, and market gains will be driven by further improvements in system designs. In addition, prices of many electronic security devices are

falling, making them more affordable to building owners looking to upgrade from conventional mechanical locks. Demand for access controls will grow the fastest, followed by closed-circuit television surveillance equipment, miscellaneous electronic security products like contraband detection and electronic article surveillance systems, and alarms. However, sales of locks and other mechanical security goods will climb as well, bolstered by generally healthy economic climates in developing parts of the world. Dollar gains will be supported by increased adoption of higher-cost hybrid mechanical/electronic security products such as electromagnetic locks and "smart" safes.

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## Sample Text, Table & Chart

**TABLE VI-12**

**INDIA  
 SECURITY EQUIPMENT SUPPLY & DEMAND**

Item	1997	2002	2007	2012
Gross Domestic Product (bil 2006\$)				
per capita GDP				
Population (mil persons)				
Median Age (years)				
% of population				
Urban Population (mil persons)				
Male Population (mil persons)				
15-24 years				
% 15-24 years				
Unemployment Rate (% of workforce)				
Reported Crimes Per 000 Persons				
\$ security/000\$ GDP				
\$ security/urban capita				
\$ security/15-24 male capita				
Security Equipment Demand (mil \$)				
net exports				
Security Equipment Shipments (mil \$)				
% India				
A/P Security Equipment Shpts (mil \$)				

### ASIA/PACIFIC

#### India: Security Equipment Outlook & Suppliers

Demand for security equipment in India is projected to rise at an annual rate of 10.9 percent through 2012 to \$1.1 billion, moderating some-  
 times to outperform product growth. Demand will be spurred by strong economic growth, resulting in the creation of new jobs and economic destabilization as industrialization efforts continue. This, in tandem with low faith in the nation's public security apparatus (reflecting both widespread police misconduct and low criminal conviction rates), will continue to bolster demand for supplemental security measures.

Building construction expenditures will also expand at a robust rate, and an influx of foreign multinational corporations will lead to greater use of advanced security systems more commonly found in developed countries. In addition, India is investing heavily in infrastructure development, especially in the security-intensive energy and transportation sectors. Growth in security equipment demand through 2012 will be restrained to some degree by the nation's ongoing use of manned security services, as well as by functional competition from structural security products such as fences and window bars.

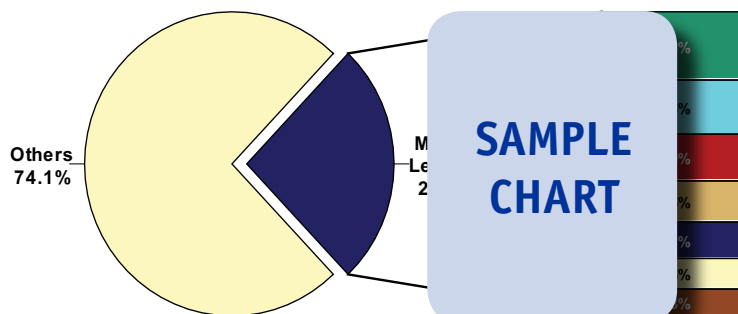
Shipments of security equipment from facilities in India are expected to increase 10.9 percent per year through 2012 to \$1.1 billion, continuing to modestly trail demand. Industry output will climb as domestic manufacturers expand their operations, foreign security product firms boost their investments in Indian factories, and efforts continue to improve the quality and functionality of locally made goods, making them more competitive in export markets. However, the country's trade deficit will widen as India's strong market growth attracts more competition from offshore suppliers, limiting future output gains.

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**CHART VIII-1**

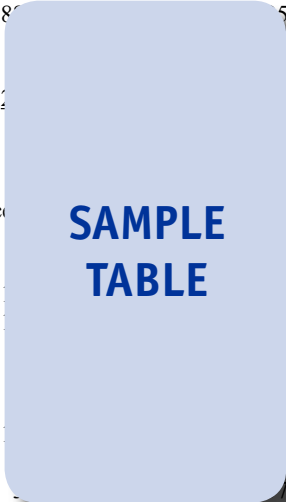
**WORLD SECURITY EQUIPMENT  
 MARKET SHARE BY COMPANY, 2007  
 (\$62.1 billion)**



## Sample Profile, Table & Forecast

**TABLE VI-12**  
**INDIA SECURITY EQUIPMENT DEMAND**  
**BY PRODUCT & MARKET**  
**(million dollars)**

Item	1997	2002	2007	2012	2017
Asia/Pacific Security Equip Demand	68				50
% India					5
India Security Equipment Demand	2				0
By Product:					
Electronic					0
Access Control/CCTV Surveillance					0
Alarms					0
Other					0
Mechanical					0
Locks					0
Other					0
By Market:					
Commercial & Industrial					0
Government & Institutional					0
Residential					0



**COMPANY PROFILES**

**American Science and Engineering Incorporated**  
 829 Middlesex Turnpike  
 Billerica, MA 01821  
 978-262-8700  
 http://www.as

Revenues: \$  
 Geographic  
 Other Count  
 Employmen

**SAMPLE PROFILE**

Key Product  
 tion technol

and x-ray detec-

American Science and Engineering (AS&E) is a leading provider of x-ray detection technology and systems. The Company develops, manufactures, markets and maintains x-ray inspection devices for critical detection and security applications. In addition, AS&E offers research, engineering and training services.

The Company participates in the world security equipment industry through the manufacture of inspection and screening systems. These systems utilize AS&E's proprietary Z BACKSCATTER, RADIOACTIVE THREAT DETECTION (RTD) and SHAPED ENERGY technologies. Z BACKSCATTER technology captures and measures the x-rays that scatter off objects under examination, and creates a photo-like image of the target. Organic objects such as drugs, explosives, composite weapons and people appear as bright objects in the image, facilitating detection. RTD technology detects gamma rays and neutrons associated with "dirty bombs" and radioactive materials. Systems equipped with RTD technology alert operators to the presence

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**"India: Products** -- Some of the strongest gains will be recorded by access controls and CCTV surveillance equipment, with product demand expected to more than double by 2012. Digital systems account for a growing share of sales, and although demand levels are currently low, use of IP surveillance systems is forecast to expand rapidly. Strong market advances will also be posted by ..."

--Section VI, pg. 232

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**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

**Chemical Sensors**

This study analyzes the US chemical sensor industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by sensor type (e.g., biosensors, electrochemical, optical, semiconductor, pellistor); analyte (e.g., carbohydrates, pH, oxygen, toxic gases); and market (e.g., medical/diagnostic, industrial, environmental monitoring, water and wastewater). The study also considers market environment factors, reviews technology, evaluates company market share and profiles leading competitors.

#2355 ..... 05/2008..... \$4500

**Advanced Flat Glass**

The US market for advanced flat glass is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by advanced glass type (e.g., safety, ballistic, hurricane, fire-rated, burglary-resistant, low-E, reflective, electrochromic, heads-up display windscreens, ultraclear and colorless, self-cleaning); and market (e.g., motor vehicle, architectural). The study also considers market environment factors, evaluates company market share and profiles leading competitors.

#2342 ..... 05/2008..... \$4500

**Electronic Security Systems**

US electronic security system demand will rise 7.8% yearly through 2012, driven in part by a high perceived crime risk despite falling crime rates. Access controls will see the fastest gains based on innovations that make them more accurate and easier to use. The more mature alarm and CCTV segments will rebound along with new housing construction. This study analyzes the \$10.7 billion US electronic security system industry, with forecasts for 2012 and 2017 by product and market. It also details market share and profiles major players.

#2332 ..... 04/2008..... \$4600

**Food Safety Products**

US demand for food safety products will grow 6.5% annually through 2012, driven by rising food safety concerns and new rules and regulations. Disinfection products will remain the largest segment and benefit from relatively new technologies such as ultraviolet and ozone equipment. Smart labels and tags will be the fastest growing products. This study analyzes the \$2.3 billion US food safety product industry, with forecasts for 2012 and 2017 by product and market. It also details market share and profiles major firms.

#2314 ..... 04/2008..... \$4500

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