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World Security Services

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

Study #2395 | September 2008 | $5900 | 462 pages

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MARKET OVERVIEW

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Gains will be driven by a generally healthy global economy, rising urbanization (contributing to social tensions and criminal activity), and heightened fears of domestic crime and terrorism.

Global demand to rise 7.5% yearly through 2012

The global market for private contract security services is forecast to advance 7.5 percent per annum through 2012 to almost $200 billion. Gains will be driven by a generally healthy global economy, rising urbanization, and heightened fears of domestic crime and terrorism in many countries. An upswing in building construction is also expected in several major economies, most notably the US, Japan and Germany.

Systems consulting among best prospects

Contract guarding will remain the largest segment of the market, accounting for over 48 percent of total revenues. Especially favorable prospects exist for services such as systems integration and consulting, which benefit from the transition from manned to electronic security modalities. By contrast, the private prison management industry has suffered a dramatic reversal of fortune since the late 1990s, as rising opposition to the privatization of correctional facilities has taken it from the fastest to one of the slowest growing segments.

Commercial, industrial market to remain dominant

The commercial and industrial security service market is by far the largest. The dominance of this market reflects its size, potential for loss and availability of significant resources for protective

World Security Service Revenues
($139 billion, 2007)

purposes. Future advances will be spurred by rising business activity and associated security requirements as the world economy continues to grow. Although the government/institutional and residential security markets are considerably smaller, they will register healthy increases through 2012. Government/institutional market gains will be fueled by the heightened security level that prevails in the post 9/11 era.

Developing regions to register fastest growth

The strongest 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 demand will be fueled by generally strong economic environments, new business formation and foreign investment activity, increased urbanization, and growing middle and upper class populations. China, India, Russia and Brazil are forecast to record some of the most robust sales increases.

The US will remain the largest single consumer of private contract security services, accounting for one-third of total world demand. Advances will trail the global average by a wide margin as alarm monitoring and prison management markets continue to mature, although a rebound in building construction will provide some support.

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Sample Forecast, Table & Text

TABLE V-12

ITALY -- SECURITY SERVICE REVENUES BY TYPE & MARKET
(million dollars)

Item	1997	2002	2007	2012	2017
Security Service Revenues	24				50
By Type:					
Guard	1				75
Alarm Monitoring					50
Armored Transport					75
Prison Management					--
Other					50
By Market:					
Commercial & Industrial	1				50
Institutional					40
Residential					50
000$ revs/employee	4				.8
Security Service Employment (000)					85

SAMPLE TABLE

WESTERN EUROPE

Italy: Services -- As proprietary guards are not widely ... Italy, private security vendors will not benefit significantly fr... outsourcing trend, unlike the ... opean ... In addition, services such as ... pete ... locks and electronic protecti... armo... and burglar resistant windo... ns, fo... is gaining popularity as a m... an se... guards across the range of n... ce st... and retail facilities, and other ... onal c... from the public sector is also intensifying. Following the Lo... derground bombings, for example, Italian officials replaced n... private guards who had been slated for use at the 2006 Torino Games with police officers.

SAMPLE TEXT

As in other European countries, the best gains will come in less penetrated segments like security consulting and systems integration. As fire-related losses in Italy are significant and have increased over the past decade, greater interest has also been generated in fire detection/suppression products and services in venues ranging from industrial plants to fire-prone forested areas.

More stringent insurance requirements and trade association standards have also bolstered demand for burglar alarms and related monitoring services. Still, in contrast to the fire alarm segment, Italy's central station intrusion alarm market is already well developed; Italian firms tend to rely heavily on monitored alarms for their security needs.

Opportunities will also be limited in the CIT segment. A sales boost based on the introduction of the euro currency had largely run its course by mid-decade, and fully 100 percent of cash transport and over 90 percent of the potential cash processing market is already in the hands of private companies, limiting outsourcing potential.

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"Security service demand in Italy is expected to increase 5.8 percent per year to $5.7 billion in 2012, outpacing projected advances for the region as a whole. Vendors will benefit from stronger economic and income growth, as well as a modest acceleration in nonresidential construction spending. Continuing organized crime activity and the threat of terrorist attacks will fuel security awareness. Greater penetration of the primarily rural Southern regions of the country is also anticipated."
--Section V, pg. 159

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Sample Profile, Table & Chart

COMPANY PROFILES

Garda World Security Corporation
1390 Barre Street
Montreal, Quebec H3C 1N4
Canada
514-281-28
http://www.

Revenues:
Geographic Canada 41%,
US and Oth
Employmen

SAMPLE PROFILE

Key Services: investigation and consulting, security officer, airport pre-board screening, pre-employment screening, cash logistics servi automated teller machine services and armored car transportation

Garda World Security is a leading Canadian provider of security products and services. The Company operates through two segment Physical Security and Other, and Cash Logistics. In April 2007, Gar acquired ATI Systems International Incorporated, a holding company that provides security, armored transport, cash handling and air carg services, for approximately US$365 million.

The Company competes in the world security services industry through both segments. Through the segments, Garda provides investigation and consulting, security officer, airport pre-board screening, pre-employment screening, cash logistics, automated teller machine (ATM) and armored car transportation services. The Company serves the institutional, financial, manufacturing, legal, distribution, energy/power, shipping, transportation, communications, pharmaceuticals, oil and gas, mining, and cash-intensive retail industries

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TABLE V-11

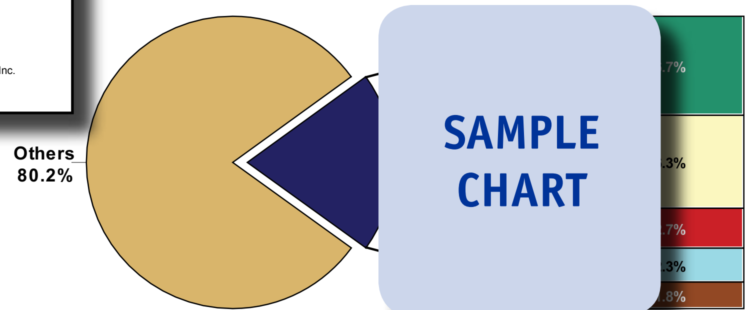
ITALY -- SECURITY SERVICE MARKET ENVIRONMENT

Item	1997	2002	2007	2012	2017
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					
Total Private Security Market (mil $)					
% services					
Security Service Revenues (mil $)					

SAMPLE TABLE

CHART VIII-1

D SECURITY SERVICE MARKET SHARE BY COMPANY, 2007
($138.6 billion)



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Other Studies

Private Security Services

US private security service demand will rise 4.7% yearly through 2012 based on high perceived risks of crime and low expectations of public safety help. Security consulting, pre-employment screening, systems integration and guarding will be the fastest growing segments. The dominant nonresidential market will lead gains. This study analyzes the $52.3 billion US private security service industry, with forecasts for 2012 and 2017 by type, market and region. It also details market share and profiles industry players.

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

World Security Equipment

Global demand for security equipment will climb 7.8% annually through 2012. Strongest gains will occur in the underdeveloped markets of Asia, Eastern Europe, Africa/Middle East and Latin America. Electronic security products will post stronger sales advances than mechanical security equipment. This study analyzes the $62.1 billion world security equipment industry, with forecasts for 2012 and 2017 by product, market, world region and for 28 countries. It also evaluates market share and profiles industry players.

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

Waste Management & Remediation Services

Demand for US waste management and remediation services will rise 5.3% annually 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

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. 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

Commercial Printing

Revenues for the US commercial printing industry will reach $82 billion in 2011. Lithographic printing will remain dominant while digital printing will grow the fastest based on lower cost, quick turnaround and ease of customization for short printing runs. Advertising will stay the top use while the label and wrapper printing segment leads gains. This study analyzes the US commercial printing industry, with forecasts for 2011 and 2016 by process and application. It also evaluates market share and profiles major players.

#2204 .... 07/2007..................... $4400

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