World Security Services

Industry Study with Forecasts for **2014 & 2019**

Study #2711 | March 2011 | $6100 | 560 pages

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World Security Services

Industry Study with Forecasts for ***2014 & 2019***

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INDUSTRY STRUCTURE

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Gains will be boosted in part by improved economic activity and building construction expenditures in developed nations, as well as continued growth in these areas in developing ones.

Global demand to rise 7.4% yearly through 2014

The global market for private contract security services is forecast to advance 7.4 percent per year through 2014. In general, demand for security services is driven by rising urbanization, the real and perceived risks of crime and terrorism, belief that public safety measures are insufficient, and growth of a middle class with assets to protect and the means to pay for supplementary security. Through 2014, gains will also be boosted by improved economic activity and building construction expenditures from a low 2009 base in developed nations, as well as continued growth in these areas in developing ones.

Developing areas to post strongest gains in demand

The strongest market gains will be posted in developing parts of Asia, Eastern Europe, Africa and the Middle East where security markets are relatively underdeveloped. Factors such as rapid gains in economic activity, rising personal incomes, foreign investment activity, and the increasing belief that public safety forces are overburdened, corrupt or insufficient will boost gains. Increasing regulation and a trend toward greater professionalism in these local security service markets will also drive growth by generating improved levels of public trust. Additionally, intensity of product use (measured against indicators such as GDP and urban population) is relatively low in these regions, indicating significant growth potential going forward. The BRIC countries of Brazil, Russia, India and China, as well as Mexico and South Africa are expected to grow at double-digit rates through 2014.

US to remain key market

The US will remain the largest single consumer of private contract security services, accounting for 29 percent of total world demand in 2014. Advances will trail the global average by a wide margin as the market for most security services continues to mature; however, spending will benefit from a strong cyclical rebound in construction and capital investment spending from a low 2009 base, following a period of economic contraction.

Contract guarding to remain largest segment

Contract guarding will continue to be the largest segment of the market, accounting for more than half of total revenues in 2014. This segment benefits from the minimal capital requirements for operation which, along with relatively low labor costs, make it the dominant security service in the developing markets. The strongest growth prospects exist for services such as systems integration and consulting, which will benefit from the transition from manned to electronic security options but will also be driven by the increased level of capital investment from the low base during the 2008-2009 recession in most developed countries.

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Sample Text, Table & Chart

TABLE VII-5

**BRAZIL:
SECURITY SERVICE OVERVIEW**

Item	1999	2004	2009	2014	2019
Urban Population (mil persons)					0
Male Population (mil persons)					8
15-24 years					7
% 15-24 years					1
Unemployment Rate (% of workforce)					--
$ security/urban capita					8
$ security/15-24 male capita					8
Security Service Revenue (mil $)					0
000$ revenues/employee					1
Security Service Employment (000)					0

SAMPLE TABLE

OTHER REGIONS

Brazil: Security Service Revenue by Type -- Bra
traditionally relied primarily on manned guarding at the expe
costly electronic security equipment. In 2009, private guardi
accounted for 75 percent of total private security service reve
larger share compared to other countries with significant secu
markets. While electronic security continues to make inroad
will remain the predominant security measures for many end
because of lower labor costs r costs
tech installations. In Brazil, ears
Brazilian citizens, either born n ap
training program, and a phys inat
submit to a background checl conv
no record of being sued; and tary

SAMPLE TEXT

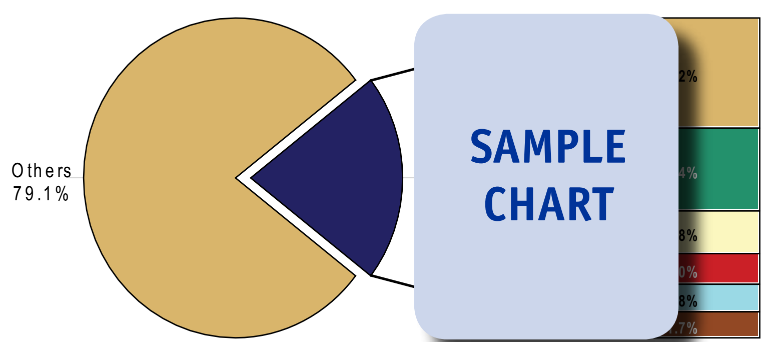
Growth in the guarding segment will be driven in large part by the increasing wealth as the country continues to develop economically. The growing feeling that citizens have valuable assets to protect, as well as the means to pay for supplemental protection, coupled with rising security concerns and skepticism of the reliability of public safety officials will spur additional spending on guarding services. The low cost of manned guarding, compared to more technology intensive options, will also drive growth. The increasing professionalization of guards through licensing and training requirements, as well as improving enforcement of these requirements will boost gains by enabling greater trust of private guard companies among the general public. Growth in this segment will also benefit from a certain level of distrust of public police a
public safety officials due to widespread reports of corruptio
responses.

Further gains in security guard revenues will be restrain
petition from in-house guards, who account for approximate
ter of total nonpublic guards in Brazil. Gains will also be slo

321 Copyright 2011

CHART VIII-1

**WORLD SECURITY SERVICE MARKET SHARE, 2009
($152.5 billion)**



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE VII-6

BRAZIL: SECURITY SERVICE REVENUE BY TYPE
(million dollars)

Item	1999	2004	2009	2014	2019
Central & S America Security Serv Rev					
% Brazil					
Security Service Revenue					
Guard					
Alarm Monitoring					
Armored Transport					
Prison Management					
Other					

SAMPLE TABLE

COMPANY PROFILES

ICTS Europe Holdings BV
Atlas Arena - Amerika Building
Hoogoorddreef 15
1101 BA Amsterdam
Netherlands
31-20-56
http://wv

Sales: $ ... e Beteiligungs AG)
Employ ... che Beteiligungs AG)
Key Serv ... rity services

ICT ... ritime and general security ... ies and government agencies. The Company is a subsidiary of Deutsche Beteiligungs AG (Germany), a private equity firm.

SAMPLE PROFILE

The Company's aviation security services include cargo scanning, patrolling, access control, people and baggage screening, and guarding services. Specific aviation services encompass the RASCARGO cargo security screening service, which involves taking an air sample from an item and testing it in an analysis unit; and the TRAVELDOC service that provides document verification services for airline passenger screening applications. Among ICTS Europe's maritime security services are port security, cruise ship passenger and luggage screening, design of port security systems, route planning and ship monitoring. General security services from the Company include guarding services, consulting, risk analysis, alarm monitoring, site-specific security teams, K-9 services, and custom training and security awareness programs.

ICTS Europe has subsidiaries in Western and Eastern Europe, the Middle East, Africa, and the Asia/Pacific region. In Western Europe,

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"Security service revenues in Brazil are projected to rise 10.5 percent per year through 2014 to $12.1 billion, continuing recent historical trends and slightly outpacing demand in Central and South America as a whole. Revenue gains will be spurred by a projected acceleration in growth of the Brazilian economy, propelling building construction expenditures and related security spending. Advances will also stem from further gains in the size of the nation's already large urban population and continuing fears among business owners and residents about being victimized by criminal activity."
--Section VII, pg. 318

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Other Studies

Waste Management & Remediation Services

This study analyzes the US waste management and remediation industry. It presents historical demand (2000, 2005, 2010) and forecasts for 2015 and 2020 by service (e.g., waste collection, waste treatment and disposal, remediation, material recovery), market (e.g., government, residential, service industries, manufacturing, construction and demolition, retail and wholesale) and US geographic region. The study also considers market environment factors, evaluates company market share and profiles major players.

#2717 .... March 2011 .... $4800

World Security Equipment

Global security equipment demand will rise 7.4 percent yearly through 2014. China, India, Russia and Turkey will see rapid growth, while North America posts gains well above average from a low 2009 base. Electronic security products will remain dominant and greatly outpace mechanical types. This study analyzes the $70 billion world security equipment industry, with forecasts for 2014 and 2019 by product, market, world region and for 28 countries. It also evaluates company market share and profiles industry participants.

#2669 ....December 2010 .... $6100

Private Security Services

US sales of private contractual security services will rise 4.9 percent yearly through 2014. Guarding and alarm monitoring will remain the largest segments while pre-employment screening, systems integration and management, and consulting will grow the fastest. The residential market will outpace nonresidential uses. This study analyzes the $49.8 billion US private security service industry, with forecasts for 2014 and 2019 by type, market and US region. It also evaluates company market share and profiles industry players.

#2675 .... November 2010 .... $4900

Commercial & Residential Cleaning Services

Revenues for contract commercial and residential cleaning services are forecast to advance 4.5 percent yearly through 2013. Exterior building cleaning will be one of the fastest growing services, while interior cleaning remains dominant. Residential and institutional buildings will see the biggest market gains. This study analyzes the $53.6 billion US commercial and residential cleaning service industry, with forecasts for 2013 and 2018 by service, market and US region. It also evaluates company market share and profiles industry players.

#2581 ....January 2010 .... $4700

Electronic Security Systems

Sales of electronic security products and systems in the US are expected to increase 9.3 percent annually through 2014. Access controls will remain the largest and fastest growing segment, followed by alarms and automotive security. The financial and office/lodging sectors will be the fastest growing markets. This study analyzes the $10.9 billion US electronic security system industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry competitors.

#2639 .... July 2010 .... $4900

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