

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

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

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

[Order Form & Corporate
Use License 7](#)

[About Freedonia,
Custom Research,
Related Studies, 8](#)



Security Products

Industry Study with Forecasts for **2016 & 2021**

Study #2917 | August 2012 | \$5100 | 464 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Demographic & Social Environment.....	5
Demographic Trends.....	6
Employment Outlook.....	9
Macroeconomic Environment.....	12
Building Construction Outlook.....	17
Residential Building Construction.....	19
Nonresidential Building Construction.....	21
Building Stock Trends.....	24
Residential Building Stock.....	25
Nonresidential Building Stock.....	28
Business Establishment Trends.....	30
Motor Vehicle Outlook.....	33
Consumer Spending Outlook.....	37
Public Safety Environment.....	40
Crime.....	42
Violent Crimes.....	45
Property Crimes.....	47
Terrorism/Other Nonconventional Crimes.....	50
Terrorism.....	51
Other Nonconventional Crimes.....	53
Fire.....	55
Legal & Regulatory Environment.....	58

SECURITY PRODUCT OVERVIEW

General	62
Electronics Overview.....	63
Electronic Components & Systems.....	65
Information Technology.....	67
Electronic Security Technologies.....	68
Sensors.....	70
Automatic Identification.....	72
Systems Integration.....	73
Environmental Control/Building Automation.....	74
Pricing Dynamics.....	75
World Security Markets.....	78
Foreign Trade.....	81

ELECTRONIC SECURITY PRODUCTS

General	84
Access Controls.....	87
Card-Based Access Controls.....	92
Technologies.....	95
Suppliers.....	98
Biometric Access Controls.....	98
Technologies.....	101
Suppliers.....	103
Keypad/Combination Access Controls.....	103

Alarms	105
Local Alarms.....	109
Smoke Detectors.....	111
Types.....	113
Suppliers.....	115
Local Intrusion Alarms.....	115
Carbon Monoxide Detectors.....	117
Types.....	120
Suppliers.....	122
Central Station Alarms.....	122
Intrusion.....	124
Fire & Smoke.....	125
Suppliers.....	126
Direct Connect Alarms.....	126
Fire & Smoke.....	128
Intrusion.....	129
Suppliers.....	129
PERS & Related Alarms.....	129
Video Surveillance.....	132
Cameras.....	136
Monitors.....	139
Recording Equipment.....	141
Other Components.....	143
Suppliers.....	144
Contraband Detection Systems.....	145
Products.....	148
Bulk EDS.....	150
Metal Detectors, X-rays, & Advanced Imaging Systems.....	152
Trace Detectors.....	154
Suppliers.....	156
Vehicle Security Products.....	156
Products.....	157
Anti-Theft Systems.....	160
Keyless Entry Systems.....	161
Vehicle Recovery Systems.....	162
Demand by Vehicle Type & Market.....	164
Electronic Article Surveillance Systems.....	165
Products.....	168
Suppliers.....	172
Other Electronic Security Products.....	172

MECHANICAL SECURITY PRODUCTS

General	175
Locks.....	177
Door Locks.....	179
Other Locks.....	181
Security Storage Equipment.....	184
Other.....	186

MARKETS

General.....	189
Consumer.....	191
Sector Outlook.....	192
Security Outlook.....	194

Residential.....	195
Automotive.....	198
Government & Institutional.....	200
Sector Outlook.....	200
Security Outlook.....	202
Government.....	205
Institutions.....	206
Industrial.....	208
Sector Outlook.....	209
Security Outlook.....	213
Trade & Distribution.....	217
Sector Outlook.....	218
Security Outlook.....	221
Financial Institutions.....	225
Sector Outlook.....	225
Security Outlook.....	227
Air Transport.....	230
Sector Outlook.....	231
Security Outlook.....	232
Office & Lodging Establishments.....	236
Sector Outlook.....	236
Security Outlook.....	238
Services.....	241
Sector Outlook.....	242
Security Outlook.....	243

INDUSTRY STRUCTURE

General.....	246
Industry Composition.....	246
Market Share.....	250
Research & Product Development.....	255
Manufacturing.....	256
Marketing & Distribution.....	257
Mergers & Acquisitions.....	260
Cooperative Agreements.....	263

COMPANY PROFILES

American Science and Engineering.....	272
Analogic Corporation.....	276
ASSA ABLOY.....	279
Bosch (Robert) GmbH.....	291
Brady Corporation.....	297
Checkpoint Systems.....	300
Danaher Corporation.....	306
Diebold Incorporated.....	307
Federal Signal.....	312
Fortune Brands Home & Security.....	316
Hitachi Limited.....	320
Honeywell International.....	322
Ingersoll-Rand plc.....	335
Jarden Corporation.....	342
Johnson Controls.....	345
JVC KENWOOD.....	349
Kaba Holding.....	351
L-3 Communications.....	356
Meggitt plc.....	361

(continued on following page)

Table of Contents

COMPANY PROFILES

(continued from previous page)

NAPCO Security Technologies	366
Nortek Incorporated	372
OSI Systems	377
Panasonic Corporation	382
Royal Philips Electronics	386
SAFRAN SA.....	389
Schneider Electric	396
Science Applications International.....	400
Siemens AG.....	404
Smiths Group.....	409
Sony Corporation	415
Stanley Black & Decker	418
Thermo Fisher Scientific	424
3M Company	427
Tyco International.....	431
United Technologies	442
Vicon Industries.....	456
Other Security Products Manufacturers.....	460

List of Tables/Charts

EXECUTIVE SUMMARY

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

MARKET ENVIRONMENT

1 Population & Households.....	9
2 Employment Outlook.....	12
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
Cht Year of Construction of Housing Stock, 2011	28
8 Nonresidential Building Stock.....	30
9 Business Establishments.....	33
10 Motor Vehicle Indicators.....	37
11 Personal Consumption Expenditures	40
Cht US Crime Rates, 2001-2010.....	45
12 Violent Crime Levels	47
13 Property Crime Levels.....	50
14 Terrorism Incidents in the US	53
15 Other Crimes.....	54
16 Fire Levels & Losses.....	58

SECURITY PRODUCT OVERVIEW

1 Security Product Supply & Demand.....	63
2 Electronic & Computer Product Shipments	65

3 Information Processing Fixed Investment.....	68
Cht World Security Product Market by Region.....	80
4 US Foreign Trade in Security Products.....	83

ELECTRONIC SECURITY PRODUCTS

1 Electronic Security Product Supply & Demand.....	86
Cht Electronic Security Product Demand by Type, 2011.....	87
2 Electronic Access Control Supply & Demand.....	91
Cht Electronic Access Control Demand by Type, 2011.....	92
3 Card-Based Access Control Demand by Type	95
4 Biometric Access Control Demand by Type	101
5 Keypad/Combination Access Control Demand	105
6 Alarm System Supply & Demand.....	108
Cht Alarm System Demand by Type, 2011.....	109
7 Local Alarm Demand by Type.....	111
8 Smoke Detector Demand by Type	113
9 Local Intrusion Alarm Demand by Type ..	117
10 Carbon Monoxide Detector Demand	120
11 Central Station Alarm Demand by Type... 124	
12 Direct Connect Alarm Demand by Type... 128	
13 Personal Emergency Response Service (PERS) & Related Alarm Demand	132
14 Video Surveillance Equipment Supply & Demand.....	135
Cht Video Surveillance Equipment Demand by Component, 2011	136
15 Video Surveillance Camera Demand.....	139
16 Video Surveillance Monitor Demand.....	141
17 Video Surveillance Recording Equipment Demand	143
18 Other Video Surveillance Component Demand	144
19 Contraband Detection System Supply & Demand.....	148
20 Contraband Detection System Demand by Type	149
Cht Contraband Detection System Demand by Type, 2011.....	150
21 Vehicle Security Product Supply & Demand.....	159
Cht Vehicle Security System Demand by Type, 2011.....	160
22 Vehicle Security Product Demand by Vehicle Type & Market	165
23 Electronic Article Surveillance System Supply & Demand	167
24 Electronic Article Surveillance System Demand by Type.....	171

Cht Electronic Article Surveillance System Demand by Type, 2011.....	171
25 Other Electronic Security System Supply & Demand.....	174

MECHANICAL SECURITY PRODUCTS

1 Mechanical Security Product Supply & Demand.....	176
Cht Mechanical Security Product Demand by Type, 2011.....	177
2 Lock Supply & Demand.....	179
3 Door Lock Demand by Type	181
4 Other Lock Demand by Type	183
5 Security Storage Supply & Demand.....	186
6 Other Mechanical Security Product Supply & Demand.....	188

MARKETS

1 Security Product Demand by Market.....	190
Cht Security Product Demand by Market, 2011	191
2 Consumer Sector Indicators.....	193
3 Consumer Security Product Market.....	195
4 Residential Security Product Market.....	198
5 Consumer Automotive Security Product Market	199
6 Government & Institutional Sector Indicators	202
7 Government & Institutional Sector Security Product Market	204
8 Industrial Sector Indicators	213
9 Industrial Security Product Market	216
10 Retail Sales	221
11 Trade & Distribution Sector Security Product Market	224
12 Financial Sector Indicators	227
13 Financial Institutions Security Product Demand	229
14 Air Carrier Outlook.....	232
15 Air Transport Security Product Market ...	235
16 Office & Lodging Construction Expenditures & Building Space.....	237
17 Office & Lodging Security Product Market	240
18 Service Sector Revenues & Establishments	243
19 Service Sector Security Product Market ..	245

INDUSTRY STRUCTURE

1 Security Product Sales by Company, 2011.....	249
Cht Security Product Market Share, 2011	251
2 Selected Acquisitions & Divestitures.....	262
3 Selected Cooperative Agreements.....	265

[Click here to purchase online](#)

Advances will result from a perceived high risk of crime and the widespread belief that public services, such as local police, are inadequate and require supplemental security arrangements.

US demand to rise 6.3% annually through 2016

The US market for security products and systems is expected to increase 6.3 percent annually to \$19.9 billion in 2016. Growth will be driven in large part by strong rebounds in construction and capital investment spending from low 2011 bases, following a period of economic contraction and a tight credit environment. Advances will result from a perceived high risk of crime and the widespread belief that public services, such as local police, are inadequate and require 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. Additionally, falling prices in some segments and improved functionality have increased market penetration across a broadened customer base.

Access controls, locks to be fastest growing types

Electronic access control systems and locks are expected to post the fastest gains of any security product through 2016. Advances for electronic access control systems will be driven by technological innovations that allow these systems to employ an increasingly sophisticated array of clearance options that are both more difficult to forge and easier to operate. Additionally, falling

US Security Product Demand, 2016 (\$19.9 billion)



Electronic Access Controls 28%

Alarms 18%

Other Electronic Security Products 28%

Locks 17%

Other Mechanical Security Products 9%

prices for many types of access controls are making these products more accessible to building owners looking to upgrade from conventional mechanical locks. Sales in value terms will be supported by the continued roll-out and adoption of newer, higher-value technologies, such as smart cards and biometrics, and the increasing adoption of these higher-value technologies. Demand for locks, including mechanical and electromechanical products, will be driven by the recovery in building construction, given that locks form the base layer of security in nearly all buildings. The expected recovery in existing home sales will also support demand for door locks, as many new homeowners replace the locks after moving in.

Office and lodging segment to lead market gains

The fastest market gains are expected in the office and lodging segment, driven by particularly strong growth in construction activity. In addition, demand will be supported by the adoption of more advanced access control systems and electronic door locks in many of these buildings. The consumer and industrial markets will also post above average gains, as many homeowners and businesses will undertake investment projects that were put off during uncertain economic times. The air transport market will continue to outpace the industry average in light of government regulations and new technologies.

Copyright 2012 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

ELECTRONIC SECURITY PRODUCTS

Vehicle Security Products

Demand for vehicle security products is expected to increase 1.5 percent in 2016, recovering from the 1.2 percent decline in 2015. The market will be supported by the expansion of vehicle production and continued moderate growth in a number of these devices. Demand for vehicle security products, coupled with the growing share of vehicles in use with these systems will provide

**SAMPLE
TEXT**

For much of the last decade, demand was supported by the penetration levels of electronic security devices at the OEM level, as automakers attempt to assuage vehicle buyers' concerns over theft by incorporating security safeguards into their products at the time of manufacture. Producers incorporated these devices on a larger share of mid-priced and even low cost vehicles. For example, more than 95 percent of new light vehicles had keyless entry devices in 2011, up from approximately two-thirds in 2001. Similarly, the OEM installation rates for engine immobilizers rose from 38 percent of new light vehicles in 2001 to 78 percent in 2011, while the penetration rate for alarm systems rose from 32 percent to 54 percent over the same period. Going forward, growth is expected to slow as penetration levels reach practical limits, which will also moderate increases in the dollars of vehicle security products per vehicle produced. While this will restrain demand increases, the growing share of vehicles in use with these systems will provide some offsetting aftermarket support, as older systems are replaced or upgraded. In addition, like many electronic products, the price of many types of vehicle security device are expected to rise modestly, despite the increased functionality of newer generation

Another factor which will restrain demand for vehicle security products will be the rising use of telematics systems, such as

157

Copyright 2012

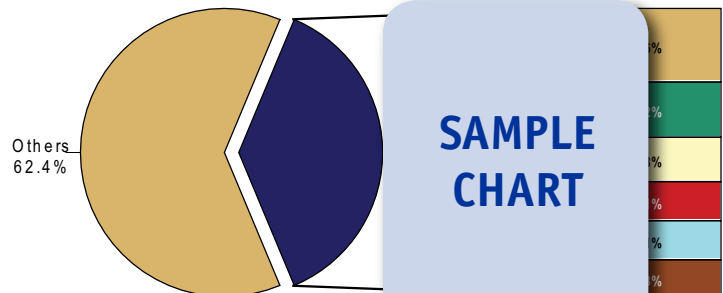
TABLE IV-1
ELECTRONIC SECURITY PRODUCT SUPPLY & DEMAND
 (million dollars)

Item	2001	2006	2011	2016	2021
Private Fixed Investment (bil \$)					
\$ security/000\$ investment					
Electronic Security Product Demand					
Access Controls					
Alarms					
Video Surveillance					
Contraband Detection					
Vehicle Security					
Electronic Article Surveillance					
Other					
- net imports					
Electronic Security Product Shipments					

**SAMPLE
TABLE**

CHART VII-1

US SECURITY PRODUCT MARKET SHARE
 (\$14.6 billion, 2011)

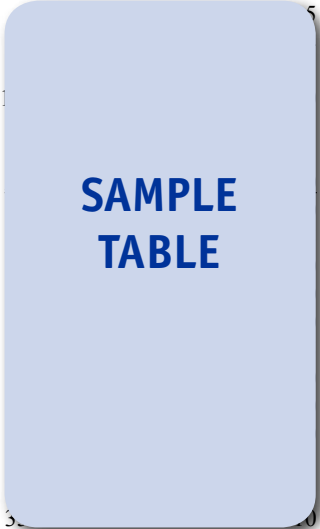


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-4
RESIDENTIAL SECURITY PRODUCT MARKET
(million dollars)

Item	2001	2006	2011	2016	2021
Residential Fixed Investment (bil \$) \$ security/000\$ investment					
Housing Stock (million) \$ security/unit					
Residential Security Product Market					
Electronic:					
Access Controls					
Alarms					
Video Surveillance					
Contraband Detection					
Other					
Mechanical:					
Locks					
Other					
% residential					
Consumer Security Product Demand					



COMPANY PROFILES

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

Revenue
 US Revenue
 Employees

Key Products: X-ray detection systems and X-ray

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 homeland security, force protection, and other critical defense applications. Additionally, AS&E offers research, engineering, and training services.

The Company participates in the US security products industry through the production of X-ray inspection and screening systems for personnel, cargo, vehicle, mail and parcel, and baggage inspection applications. These systems employ a combination of AS&E's proprietary Z BACKSCATTER, RADIOACTIVE THREAT DETECTION (RTD), SHAPED ENERGY, and TRANSMISSION technologies. Systems based on Z BACKSCATTER technology use electronically generated X-rays to scan an object and create high-clarity, photo-like images to determine such organic materials as explosives, drugs, cigarettes, and people hidden within complex environments. RTD technology detects both neutrons and gamma rays characteristic of items including

"The residential market for security products and systems will rise 8.4 percent annually to \$4.1 billion in 2016, rebounding from the sharp declines posted between 2006 and 2011. The recovery in residential construction activity and home sales will be particularly salient factors supporting the rebound -- especially the double digit gains in access control and lock demand from low 2011 levels. The rebound in ..." --Section VI, pg. 195

OTHER STUDIES

World Security Services

Global demand for private contract security services will increase 7.4 percent annually to \$244 billion in 2016. China, India, Mexico, Russia, and South Africa will lead gains, but the US will remain the largest consumer. Contract guarding will continue as the most common service while alarm monitoring grows the fastest. This study analyzes the \$171 billion world security service industry, with forecasts for 2016 and 2021 by service, market, world region and for 21 major countries. The study also evaluates company market share and profiles industry participants.

#2978January 2013 \$6400

Private Security Services

US demand for private contracted security services will rise 5.4 percent annually to \$64.5 billion in 2016. Security consulting will lead gains, followed closely by systems integration and management. Alarm monitoring and correctional facilities management will also do well. The residential market will outpace the dominant nonresidential segment. This study analyzes the \$49.7 billion US private security service industry, with forecasts for 2016 and 2021 by type, market and region. The study also evaluates company market share and profiles industry players.

#2944October 2012 \$5100

Contract Cleaning Services

US revenues for contract cleaning services are forecast to rise 4.8 percent yearly to \$68.3 billion in 2016. Interior cleaning services will continue to account for the largest share of sales, but revenue from exterior cleaning services will grow the fastest. The industrial, institutional and residential markets will offer above-average growth prospects. This study analyzes the \$54.1 billion US contract cleaning service industry, with forecasts for 2016 and 2021 by service, market and region. The study also evaluates company market share and profiles industry players.

#2886May 2012..... \$4900

World Major Household Appliances

World demand for major household appliances (white goods) is forecast to rise 3.4 percent annually through 2015. The bedrock US market will recover from recent declines, while India will be the fastest growing market. "Smart" appliances -- which offer advanced features at higher prices -- will gain market share in developed markets. This study analyzes the 334.2 million unit world major appliance industry, with forecasts for 2015 and 2020 by product, world region and for 25 countries. The study also evaluates company market share and profiles industry players.

#2822November 2011..... \$6300

Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies is forecast to grow 2.2 percent annually through 2015, an improvement over the 2005-2010 decline. Manual cleaning products will see the fastest gains of any major segment, driven by microfiber cloths, wipes, wet mops and squeegees. Institutional buildings will be the fastest growing market. This study analyzes the \$5.9 billion US janitorial equipment and supply industry, with forecasts for 2015 and 2020 by type, market and US region. The study also evaluates company market share and profiles industry players.

#2770August 2011..... \$4900

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)