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World Security Services

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

Study #2978 | January 2012 | \$6400 | 566 pages

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Global demand for security services is driven by rising urbanization, the real and perceived risks of crime and terrorism, and a belief that public safety measures are insufficient.

Worldwide demand to rise 7.4% yearly through 2016

Global demand for private contract security services will increase 7.4 percent annually to \$244 billion in 2016. 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 measures. The security service market will also be supported by an improved economic environment and building construction activity.

Developing areas to see strongest gains in demand

The strongest gains will be posted in developing parts of Asia, Eastern Europe, Africa, and the Middle East, where security markets are relatively underdeveloped. In fact, several -- markets, including China, India, Mexico, Russia, and South Africa -- are expected to achieve double-digit annual growth through 2016. In many of these areas, the intensity of security service use (measured against indicators such as GDP and urban population) is relatively low, indicating significant growth potential going forward. Factors such as rapid gains in economic activity, rising personal incomes, foreign investment activity, and concern that public safety forces are overburdened, corrupt, or unable to provide sufficient protection will boost gains. Furthermore, increasing

World Security Service Revenue (\$244 billion, 2016)



regulation and a trend toward greater professionalism in many of these local security service markets will improve public trust in security service businesses, thereby driving gains.

US to remain largest market

The US will remain the largest national consumer of private contract security services, accounting for 26 percent of total world demand in 2016. Despite its maturity, the dominant size of the US market means that it will account for more than one-fifth of total global increases between 2011 and 2016, even with a below average growth rate. Brazil, the world's second largest national market in 2011, will post above average increases and represent another seven

percent of global growth through 2016. Two smaller developing national markets for security services, India and China, will together account for an additional 13 percent of world gains through 2016.

Contract guarding to remain largest service segment

Contract guarding will continue to be the largest type of security service, accounting for more than half of total revenues in 2016. This segment benefits from the minimal capital requirements for operation which, along with relatively low labor costs, make it the dominant security service in developing markets. The alarm monitoring segment is expected to see the strongest growth.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Security Service by Type

Security guard services accounted for the largest share of security revenue in China, at significantly above the global average. The low cost of manned guard services is a major industry. Furthermore, in many areas, a large number of migrant workers seeking employment are providing a workforce for guard services. Security guards increasingly appear both inside and outside office buildings, industrial facilities, shopping centers, nightclubs, and numerous other venues. Gains will also be aided by the increasing ability of private guard firms, including large multinational security guard companies, to establish operations in China, albeit from a limited scale as the regulatory environment and local officialdom still tend to in practice restrict participation.

Additionally, a growing number of executives, celebrities, and families are hiring bodyguards to provide personal protection. Because of rules restricting the carrying of firearms in China, bodyguards are more likely to have skills in martial arts instead. Among some segments of the market, female bodyguards are particularly popular, since they are seen as being more discreet, often appearing to the general public as a secretary, nanny for the children, or some other service worker.

Further advances in private guard service revenue will be restrained by functional competition from public security officers, in-house staffs, and unlicensed, black market security operators who have lower operational costs compared to properly licensed companies. This trend is particularly applicable among low level guards who provide basic stationary security services. In China, many b

253

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**SAMPLE
TEXT**

TABLE VI-7

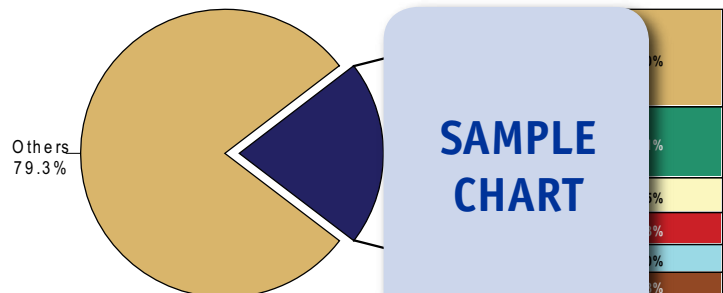
CHINA: SECURITY SERVICE REVENUE BY TYPE
(million dollars)

Item	2001	2006	2011	2016	2021
Asia/Pacific Security Service Revenue % China					
China Security Service Revenue					
Guard					
Alarm Monitoring					
Armored Transport					
Prison Management					
Other					

**SAMPLE
TABLE**

CHART VIII-1

WORLD SECURITY SERVICE MARKET SHARE
(\$170.8 billion, 2011)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

COMPANY PROFILES

ICTS Europe Holdings BV

Atlas Arena - Amerika Building

Hoogoor

1101 BA

Netherla

31-20-56

http://wv

**SAMPLE
PROFILE**

Sales: \$ (Deutsche Beteiligungs AG)
 Employr (Deutsche Beteiligungs AG)

Key Services: aviation, maritime and general security services

ICTS Europe Holdings provides aviation, maritime, and general security services at airlines, airports, cargo companies, and government agencies. The Company is a subsidiary of Deutsche Beteiligungs AG (Germany), a private equity firm.

The Company's aviation security services include cargo screening, passenger baggage screening, hold baggage screening, perimeter security and access control, guarding services, consulting and audits, and terminal welcome and reception services. Specifically, ICTS Europe Holdings offers RASCARGO cargo screening systems, which draw air samples from scanned items and test them in an analysis unit; and TRAVELDOC travel documentation verification systems for detection of missing, stolen, forged, or suspicious passports and visas, among others. Maritime security services from the Company include route planning and ship monitoring, cruise ship passenger and luggage screening, port security, and design of port security systems. ICTS Europe Holdings offers such general security services as risk assessments, consulting, guarding services, K-9 services, site specific security

TABLE VI-6

ASIA/PACIFIC: SECURITY SERVICE REVENUE BY TYPE & MARKET (million dollars)

Item	2001	2006	2011	2016	2021
World Security Service Revenue % Asia/Pacific					
Asia/Pacific Security Service Revenue By Type:					
Guard					
Alarm Monitoring					
Armored Transport					
Prison Management					
Other					
By Market:					
Commercial & Industrial					
Government & Institutional					
Residential					

**SAMPLE
TABLE**

"The residential market is expected to achieve the fastest growth, from an extremely small 2011 base, nearly tripling to \$270 million in 2016. Private residences have traditionally relied on mechanical means (e.g., gates, iron doors, and window bars) for security, but have more recently begun to emerge as markets for alarm services. In addition, a growing number of wealthy individuals, business leaders, and celebrities in China are hiring bodyguards to provide a personal level of security. Furthermore, ..."
 --Section VI, pg. 257

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OTHER STUDIES

Consumer Water & Air Treatment Systems

US demand for consumer water and air treatment systems will rise 6.9 percent yearly to \$2.3 billion in 2017. Whole-house air treatment systems will be the fastest growing segment, while point-of-use water treatment systems will remain the largest. Water filters and membranes will remain the largest consumables category. This study analyzes the \$1.6 billion US consumer market for water and air treatment systems, with forecasts for 2017 and 2022 by technology, product, and region. The study also evaluates company market share and profiles industry players.

#3032 May 2013 \$5300

World Security Equipment

World demand for security equipment will advance 7.0 percent annually to \$117 billion in 2016. The fastest gains will be in parts of Asia, Eastern Europe, Africa, and the Middle East where security markets are relatively underdeveloped. The dominant electronic security products segment will outpace mechanical security equipment. This study analyzes the \$83.1 billion world security equipment industry with forecasts for 2016 and 2021 by product, market, world region and for 18 major countries. The study also evaluates company market share and profiles industry participants.

#3005 March 2013 \$6300

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.

#2944 October 2012 \$5100

Security Products

The US market for security products and systems is expected to increase 6.3 percent annually to \$19.9 billion in 2016. Electronic access control systems such as smart cards and biometrics, as well as mechanical and electromechanical locks, will post the fastest gains as new construction rebounds. The most rapid market growth will occur in the office and lodging segment. This study analyzes the \$14.6 billion US security product industry, forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2917 August 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.

#2886 May 2012 \$4900

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