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# World Security Equipment

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

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Study #3005 | March 2013 | \$6300 | 701 pages

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*Developing regions will increasingly have both the need for and means to invest in security products, and because these markets are relatively immature, there is still good growth potential.*

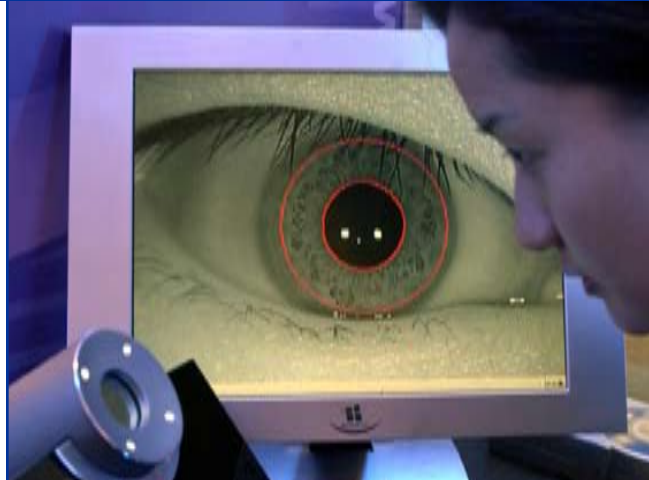
## World demand to rise 7.0% annually through 2016

World demand for security equipment will advance 7.0 percent annually and approach \$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. Gains will be fueled by greater economic growth, new business formation and foreign investment activity, rising urbanization, and growing middle and upper class populations. Developing regions will increasingly have both the need for and means to invest in security products. Because the intensity of security product use is relatively low in these areas, there is still significant growth potential.

## China, India to offer best growth opportunities

Among major individual national markets, the fastest increases in security equipment demand will be in China and India, which will each see growth in excess of 10 percent annually through 2016. These markets will benefit from fast increases in GDP, urban population, and building construction activity. Despite rapid gains over much of the past decade, the use of many types of security equipment in these countries remains low compared to more mature markets. This is true even in China, which grew to be the largest market for security equipment in 2011 after sales more than doubled between 2006 and

## World Security Equipment Demand (\$116.5 billion, 2016)



Asia/Pacific  
36%

Western Europe  
24%

North America  
19%

Other Regions  
21%

photo: Fabian Bimmer AP

2011. However, spending on security products per person in China in 2011 was still less than half the level in the US or in much of Western Europe. Through 2016, China is forecast to account for more than one-quarter of global gains in security equipment sales.

Security equipment demand in North America is expected to rise 6.5 percent annually through 2016. Although this will somewhat lag the global average, it is a significant improvement over the 2006-2011 pace. Growth will be driven by a rebound in construction, and faster growth in GDP and consumer incomes. Advances will also be aided by growth in penetration for security equipment in Mexico, the least developed market for

these products in the region. Gains in Western Europe and Japan will be more modest. While these markets will also experience growth resulting from improving economies and concerns about crime, their relative maturity will constrain increases.

## Electronic security products to outpace mechanical

Electronic security products accounted for nearly 65 percent of total global security equipment demand in 2011. These products are also expected to post faster sales advances than mechanical security equipment through 2016.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### India: Security Equipment Supply & Demand

Demand for security products in India was \$1.6 billion in 2011, nearly double the level of 2006. This growth is a part of economic growth, high level of urbanization and rapid gains in per capita income. Demand in the country stems from its large population, social diversity, political instability, and frequent organized and sporadic terrorism. Investment by multinational companies in security infrastructure compared to local operators. However, the market is extremely immature -- intensity of product use in India is very low in relationship to urban capita, GDP, and building construction. This is primarily due to the fact that labor costs are so low and the population is so large that the use of security guards far outweighs security measures. For instance, India is one of the few places in the world where ATMs are routinely protected by security guards, often by cameras or alarms.

**SAMPLE  
TEXT**

Demand for security equipment in India is forecast to increase just over 11 percent annually to \$2.7 billion in 2016. While this is a slight moderation from the 2006-2011 pace, it is the fastest rate of growth for any country in the world. Increases will be spurred by gains in per capita income and urban population, resulting in the creation of sizable amounts of wealth and economic destabilization. The ongoing process of economic liberalization and development, along with concerns about crime and terrorism, will also contribute to the growth of security equipment sales in India. Furthermore, many individuals and businesses have little confidence in the nation's public security apparatus -- rampant police misconduct, low criminal conviction rates, and inefficient staffing levels -- which supports demand for supplemental security measures. Beyond traditional criminal activity, India has seen an increase in terrorism related to cross-border tensions with Pakistan and separatist

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TABLE VI-13

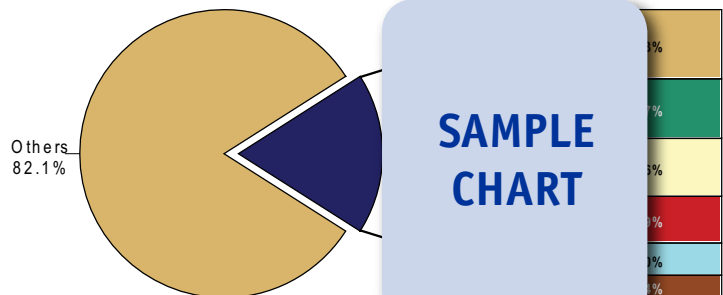
#### INDIA: SECURITY EQUIPMENT SUPPLY & DEMAND

Item	2001	2006	2011	2016	2021
Urban Population (mil persons)	200	250	300	350	400
Male Population (mil persons)	100	120	140	160	180
15-24 years	10	12	14	16	18
% 15-24 years	10	10	10	10	10
Unemployment Rate (% of workforce)	10	10	10	10	10
Reported Crimes Per 000 Persons	10	10	10	10	10
\$ security/urban capita	10	10	10	10	10
\$ security/15-24 male capita	10	10	10	10	10
Security Equipment Demand (mil \$)	100	150	200	250	300
net exports	10	10	10	10	10
Security Equipment Shipments (mil \$)	100	150	200	250	300
% India	10	10	10	10	10
Region Security Equip Shpts (mil \$)	100	150	200	250	300

**SAMPLE  
TABLE**

CHART VIII-1

#### WORLD SECURITY EQUIPMENT MARKET SHARE BY COMPANY (\$83.1 billion, 2011)



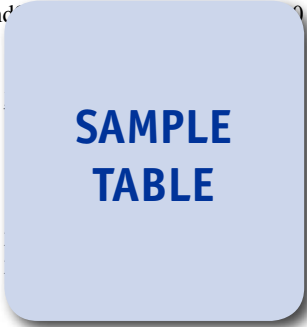
**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

**TABLE VI-14**

**INDIA: SECURITY EQUIPMENT DEMAND BY PRODUCT**  
(million dollars)

Item	2001	2006	2011	2016	2021
Asia/Pacific Security Equipment Demand % India					
India Security Equipment Demand					
Electronic:					
Access Control/Video Surveillance					
Alarms					
Other					
Mechanical:					
Locks					
Other					



**COMPANY PROFILES**

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

**SAMPLE PROFILE**

Revenues: \$...  
 Geographic F... IS 66%, Other  
 North Americ... 22%, Asia/  
 Pacific Regio...  
 Employment...

Key Products/Technologies: X-ray inspection and screening systems, and X-ray detection technologies

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.

AS&E competes in the world security equipment industry through the production of X-ray inspection and screening systems that employ a combination of AS&E's proprietary Z BACKSCATTER, SHAPED ENERGY, RADIOACTIVE THREAT DETECTION (RTD), and TRANSMISSION technologies. These systems are suitable for cargo, mail and parcel, personnel inspection applications, baggage, and vehicle. Z BACKSCATTER technology based systems utilize electronically generated X-rays that scan an object and create high clarity, photo-like images for identifying such organic materials as explosives, drugs, cigarettes, and people hidden within complex environments.

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"Shipments of security equipment from facilities in India are expected to increase more than 10 percent per annum to \$2.4 billion in 2016, continuing to modestly trail demand. Industry output will climb as domestic manufacturers expand their operations and foreign security product firms boost their investments in Indian factories. An increasing number of multinational companies are expected to shift manufacturing to India or form alliances with local companies since a physical presence helps foreign companies gain acceptance and visibility among Indian consumers. Gains will also stem from ..."  
 --Section VI, pg. 281-2





**OTHER STUDIES**

**Home Organization Products**

This study analyzes the US home organization product industry. It presents historical demand data (2002, 2007, 2012) and forecasts for 2017 and 2022 by material (e.g., metal and wire, plastic, wood), product (e.g., bins, baskets and totes; shelving; modular units; hanging storage), room (closets and bedrooms, family rooms, garages, pantries and kitchens, bathroom and utility rooms) and market (do-it-yourself, professional installers). The study also considers market environment factors, evaluates company market share and profiles industry players.

#3027 ..... May 2013 ..... \$5100

**World Power Tools**

World power tool demand is forecast to increase 4.5 percent annually through 2016 to \$28.1 billion. The Asia/Pacific region will be the fastest growing market, followed by North America. In the US, gains will be driven by a rebound in housing starts and manufacturing activity. Cordless electric tools will be the fastest growing segment. This study analyzes the \$22.5 billion world power tool industry, with forecasts for 2016 and 2021 by product, market, world region and for 25 countries. The study also evaluates company market share and profiles industry players.

#2996 ..... February 2013 ..... \$6300

**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.

#2978 ..... January 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.

#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

**About The Freedonia Group**

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