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World Security Equipment

Industry Study with Forecasts for **2018 & 2023**

Study #3228 | March 2015 | \$6600 | 695 pages

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In developing areas, real and perceived concerns about crime and social unrest, along with economic growth and foreign investment, will boost both the need for and the means to invest in security equipment.

World demand to rise 6.8% yearly through 2018

World demand for security equipment will increase 6.8 percent annually to \$126 billion in 2018. The fastest gains will be in parts of Asia, Central and South America, Africa, and the Middle East, where security markets are relatively underdeveloped and the intensity of security product use is low. In these areas, real and perceived concerns about crime and social unrest, along with economic growth, foreign investment activity, rising urbanization, and growing middle and upper class populations, will boost both the need for and the means to invest in security equipment. In the US and Western Europe, an improved economic outlook and rebound in building construction activity will provide growth opportunities.

Technological innovations that improve the functionality, accuracy, ease of use, or speed of operation of security systems will also support demand in developed markets. Furthermore, the integration of security equipment with smart phones and other electronic devices, as well as with lighting, heating, and other building systems, will aid sales of security equipment.

India, China to be fastest growing markets

Among individual national markets, the fastest gains are expected in India and China, both of which will generate

World Security Equipment Demand, 2018 (\$126 billion)



Asia/Pacific

Western Europe

North America

Other Regions

double-digit annual growth through 2018. Additionally, Mexico, South Africa, and Turkey will all post annual gains of at least eight percent. 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 was the largest market for security equipment in 2013, with nearly one-fifth of global sales. The rapid growth in China will be especially important to the global security equipment industry -- in 2018, the Chinese security equipment market will be \$11.5 billion larger than it was in 2013, accounting for one-third of global growth over the period.

Although lagging the gains of these developing markets, North America and Western Europe are forecast to see significant improvements in security equipment sales. Growth will be driven by a projected recovery in the large US market, benefiting from a rebound in construction, product innovations, and improvement in GDP and consumer income trends. While gains in Western Europe will not rise as quickly, they too represent continued acceleration following a period of extended economic weakness. The market in Western Europe will benefit from improving economies and interest in upgrading installed security equipment, but will be constrained by its relative maturity.

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Sample Text, Table & Chart

OTHER REGIONS

Brazil: Security Equipment Supply & Demand

demand for security equipment in Brazil totaled \$2.5 billion, accounting for 48 percent of all Central and South America products. The comparatively large size of the nation's security market is due to the large size of its economy and urban population. As in other regions, however, intensity of product use in Brazil is below global norms, particularly relative to urban population, but also relative to GDP and the number of resident males between 15 and 24 years of age. The country has been slow to adopt electronic security measures such as alarm and video surveillance systems, so low tech options such as manned security services, basic locks, and structural building security -- including gates and window bars -- have been the country's supplemental security measures. Since 2008, this trend has changed to some degree, particularly in cities that hosted the 2014 World Cup around Rio de Janeiro, where the 2016 Summer Olympic Games were held. However, the overall use of many types of security equipment is below global averages, and significantly lower than the penetration common in developed markets.

Sales of security equipment in Brazil are expected to post annual growth of \$1.5 billion in 2018, a moderation from recent years but faster than increases in Central and South America and will be spurred by continuing growth in the country's population, and personal incomes. In addition, residential construction will provide opportunities supported by fears among business owners of being victimized by criminal activity. Following stricter fire and security regulations and enforcement following a nightclub fire in Santa Maria that killed more than 200 will stimulate demand for fire alarms and fire extinguishers. In the aftermath of the tragedy, more than 60 percent of nightclubs in São Paulo were found to be in violation of safety regulations. Suppliers will also continue to

**SAMPLE
TEXT**

338

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TABLE V-21

UNITED KINGDOM: SECURITY EQUIPMENT SUPPLY & DEMAND

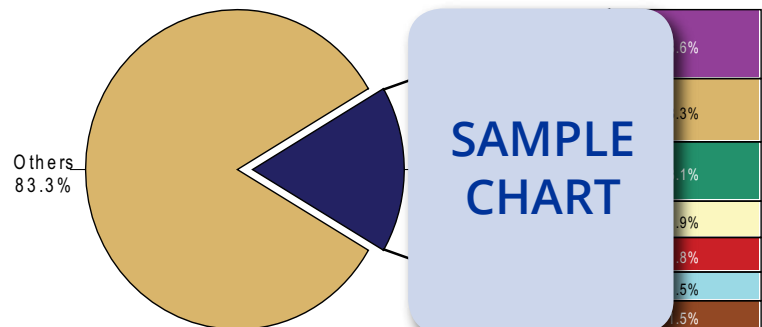
Item	2003	2008	2013	2018	2023
Urban Population (mil persons)					
Male Population (mil persons)					
15-24 years					
% 15-24 years					
Unemployment Rate (% of workforce)					
Reported Crimes Per 000 Persons					
\$ security/urban capita					
\$ security/15-24 male capita					
Security Equipment Demand (mil \$)					
net exports					
Security Equipment Shipments (mil \$)					
% United Kingdom					
West Europe Security Equip Shpts (mil \$)					

**SAMPLE
TABLE**

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD SECURITY EQUIPMENT MARKET SHARE, 2013 (\$90.2 billion)



**SAMPLE
CHART**

Sample Profile & Table, & Study Coverage

TABLE VI-6

CHINA: SECURITY EQUIPMENT DEMAND BY PRODUCT
(million dollars)

Item	2003	2008	2013	2018	2023
Asia/Pacific Security Equip Demand % China					
China Security Equipment Demand					
Electronic:					
Access Control/Video Surveillance					
Alarms					
Other					
Mechanical:					
Locks					
Other					

Source: The Freedonia Group, Inc.

COMPANY PROFILES

Yantai Tri-Circle Lock Industry Group Company Limited

47 Xinanhe Road
 Yantai, Shandong
 China
 86-53-5683-4
<http://www.tr>

Annual Sales
 Employment:

Key Products: systems

Yantai Tri-Circle Lock Industry is a manufacturer of a wide range of locking devices and anti-theft door products. The privately held company operates numerous subsidiaries, and sells products in over 160 countries.

The Company competes in the world security equipment industry via several Chinese subsidiaries, among them Penglai Sanling Locks Company Limited, Science and Technology Company, Rushan Double Link Company Limited, International Trade Company Limited, and Dubai Tri-Circle Trade Company. Yantai Tri-Circle Lock Industry's Penglai Sanling Locks subsidiary is engaged in the manufacture of padlocks, door locks, brass cylinders, mortise locks, and other locking devices under the TRISQUARE and MECC brand names. The Company's Science and Technology subsidiary produces such items as electronic keypad, electromechanical, and voice-prompted locks; and biometric verification systems.

Rushan Double Link produces a wide range of locks, such as iron, brass, square, high-precision, burglar-proof, ball pin, lever door, anti-pry, window, door, and roll gate styles. For example, the company's



Related Studies

Consumer Water & Air Treatment Systems

This study analyzes the US consumer market for water and air treatment systems. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by technology (e.g., filtration, reverse osmosis, distillation, ion exchange salts, electrostatic, ionization, UV treatment, ozone treatment), product (e.g., whole-house systems, point-of-use water treatment, portable air treatment, consumables), and US region. The study also considers market environment factors, evaluates company market share, and profiles industry players.

#3281 May 2015 \$5500

Private Security Services

This study analyzes the US private security service industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by type (e.g., guarding, alarm monitoring, private investigation, correctional facility management, armored transport, systems integration, security consulting, pre-employment screening), market (e.g., commercial, government, industrial, institutional, residential) and US region. The study also considers market environment factors, evaluates company market share and profiles industry players.

#3268 May 2015 \$5400

Home Organization Products

This study analyzes the US home organization product industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by material (e.g., metal and wire, plastic, wood), product (e.g., bins, baskets and totes; shelving; modular units; hanging storage), room (e.g., closets and bedrooms, garages, family rooms, pantries and kitchens, bathrooms and utility rooms), and market (DIY, professional). The study also considers market environment factors, evaluates company market share, and profiles industry competitors.

#3254 May 2015 \$5300

World Power Tools

Global power tool demand will rise 4.8 percent per year through 2018 to \$32.9 billion. The US will remain the largest market, while China and India remain the fastest growing. Cordless electric tools will outpace the larger corded power tool segment. The dominant professional market will outpace consumer demand. This study analyzes the \$26 billion world power tool industry, with forecasts for 2018 and 2023 by product, electric power source, market, world region, and for 25 countries. The study also evaluates company market share and profiles industry participants.

#3241 January 2015 \$6500

World Security Services

Global demand for private contract security services is forecast to increase 6.9 percent per year to \$267 billion in 2018. The fastest gains will occur in developing parts of Asia, Central and South America, Africa, and the Middle East. The dominant contract guarding segment will achieve the fastest gains. This study analyzes the \$191 billion world security service industry, with forecasts for 2018 and 2023 by service, market, world region, and for 21 countries. The study also evaluates company market share and profiles industry participants.

#3201 November 2014 \$6600

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 and other world markets. Industries analyzed by Freedonia include:

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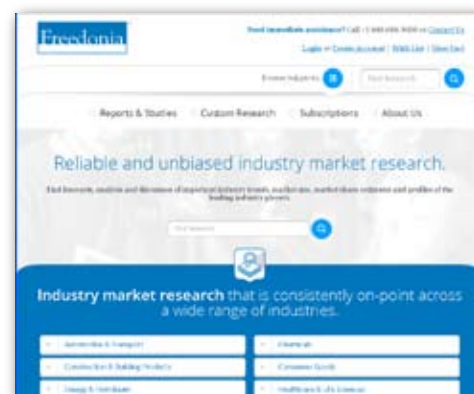
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