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Electronic Security Products

US Industry Study with Forecasts for **2019 & 2024**

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1 Electronic Security Product Market Share, 2014227

Demand will be driven by growing new construction spending, where electronic security products are often installed, and by a heightened perceived risk of crime due to media focus on high profile tragedies.

US demand to grow 7% annually through 2019

Demand for electronic security products in the US is projected to rise 7.0 percent annually through 2019 to \$16.2 billion. Strengthening new construction expenditures following the recession-impacted 2009-2014 period will drive gains, as electronic security products are often installed during initial construction. A heightened perceived risk of crime due to widespread media coverage of high profile crimes and tragedies will also support gains, even as the number of crimes has declined in recent years.

Technology gains to drive sales in all segments

Technological advances will promote sales gains in all segments, both by providing a boost to value demand via the incorporation of value-added features and by increasing market penetration. Rising interest in networked, IP connected systems that provide interoperability between various electronic security systems and building automation systems will continue to promote growth of higher value devices. For instance, there is an ongoing shift from legacy analog video surveillance systems to digital, IP capable ones. In addition to interoperability, digital video components benefit from the incorporation of video analytics software at the original equipment manufacturers' level, as well as the ability to use mobile and other offsite monitoring and Cloud-based storage. As a result of this transition to IP



systems, the video surveillance product segment is projected to experience the fastest gains through 2019. Concerns regarding the potential for criminals hacking into these interconnected electronic security devices will drive demand for higher value versions that incorporate cyber hardened capabilities such as encryption and authentication.

Interoperability as well as innovations in mobile monitoring will boost demand for alarms. The increasing array of plug-and-play electronic security devices that are self-monitored will expand the potential market base of consumers willing to purchase supplemental security measures. These products are appealing to those who believe their risk of crime does not require more sophisticated

monitored alarm systems that have high ongoing monitoring fees. Furthermore, these smart products are controlled and accessed via mobile devices, aiding security equipment sales as interest in smart home automation systems also rises. The alarm segment will further benefit from innovations in personal emergency response service (PERS) alarms, particularly for types that integrate mobile technology. Access control systems will see strong gains as smart card-based systems gain traction over less secure technologies such as proximity and magnetic stripe cards. Access control systems that integrate increasingly advanced layers of credentials, such as mobile phones and biometrics, will support further gains.

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Sample Text, Table & Chart

PRODUCTS

Biometric Access Controls

As defined in this study, biometric access control products are readers and other equipment which incorporate biometric capabilities as the most secure access technology, even if they also use card supplemental or complementary credentialing. Demand for biometric access control products and systems is expected to rise at an annual pace to \$1.6 billion by 2024, with the fastest gains among primary classes. These advances have led to a slight decrease in sales in 2014 period as the prominent systems, however, falling prices have led to more accessible systems, particularly in security areas. However, there has been much skepticism of access control systems within the industry, and concerns regarding products' efficiency, accuracy, and ease of use have persisted. Still, ongoing technological improvements and the incorporation of biometric capabilities into consumer products such as smart phones have led to growing confidence among end users. Furthermore, the rising availability of consumer biometric products has generated both technological and cost improvements. The rising familiarity with consumer products that incorporate biometrics supported demand for these products into 2014 and will continue to provide a boost to sales going forward.

Many facilities are interested in the high level of security that biometric access control systems offer. Rather than depending on knowing an access code or having a card, these systems verify unique characteristics of the person wishing to gain access. Unlike a code or a stolen card, biometric characteristics are innate to the user; they will never be lost, stolen, or forgotten, making it much more difficult to gain unauthorized access. However, concerns still exist

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SAMPLE
TEXT

TABLE IV-3

LIFE SAFETY ALARM DEMAND BY APPLICATION & PRODUCT (million dollars)

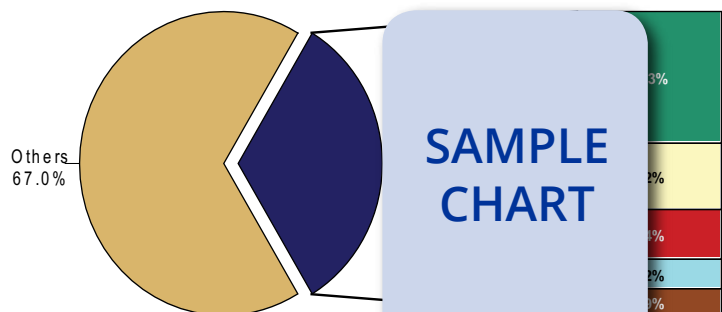
Item	2004	2009	2014	2019	2024
Building Stock (bil 2009\$) \$ life safety alarms/mil \$ stock	2				
Building Construction (bil \$) \$ life safety alarms/000\$ construction					
Life Safety Alarm Demand By Application: Local Central Station Direct Connect By Product: Smoke & Fire Detectors Carbon Monoxide Detectors					
% life safety Alarm System Demand					

SAMPLE
TABLE

Source: The Freedonia Group, Inc.

CHART VI-1

ELECTRONIC SECURITY PRODUCT MARKET SHARE, 2014 (\$11.6 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE V-5
CONSUMER SECURITY PRODUCT MARKET
 (million dollars)

Item	2004	2009	2014	2019	2024
Residential Fixed Investment (bil \$) \$ security/000\$ investment					
Housing Stock (million) \$ security/unit					
Resident Population (million) \$ security/capita					
Consumer Electronic Security Market					
Access Controls					
Alarms					
Video Surveillance					
Contraband Detection					
Other					
% consumer Electronic Security Product Demand					

Source: The Freedonia Group, Inc.

SAMPLE
PROFILE

SAMPLE
TABLE

STUDY
COVERAGE

This Freedonia study, *Electronic Security Products*, presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by product and market. In addition, this study considers key market environment factors, analyzes the industry structure, assesses company market share and profiles 42 competitors in the US industry.

COMPANY PROFILES

S2 Security Corporation
 1 Speen Street
 Framingham, MA 01701
 508-663-2500
<http://www.s2security.com>

Annual Revenue: \$100 million
 Employment: 100

Key Products: Access control, video management, and integrated systems

S2 Security manufactures and sells Internet protocol (IP)-based physical security and video management systems. The Company is privately held.

The Company competes in the US electronic security product industry via the manufacture of credential-based access control, video management, and integrated systems for security end uses. Credential-based access control systems from S2 Security include S2 NETBOX and S2 NETBOX EXTREME web-based systems that integrate access control, alarm monitoring, video surveillance, and temperature monitoring systems within one IP-based, network-ready system. Additionally, the Company makes S2 ENTERPRISE systems, which are similar to S2 NETBOX systems but engineered for much larger, more heavily networked environments; and S2 GLOBAL systems designed to manage distributed physical security systems via the integration of security management and video management equipment.

The Company produces such video management systems (VMSs) as S2 NETVR units, which can support up to 16 cameras and enable live video controls, as well as on-screen pan/tilt/zoom controls from

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Related Studies

Landscaping Products

Demand for landscaping products in the United States is forecast to grow 5.3 percent per year to \$8.2 billion in 2019. Decorative products will remain the largest segment, while hardscape products will continue as the fastest growing. Environmental concerns will favor products such as solar lighting and permeable pavers. This study analyzes the \$6.3 billion US landscaping products industry, with forecasts for 2019 and 2024 by product, market, end user, and US region. The study also evaluates company market share and profiles industry players.

#3300.....August 2015.....\$5300

Private Security Services

US demand for private contracted security services will rise 4.2 percent annually through 2019 to \$66.9 billion. Systems integration and security consulting will be the fastest growing services, while guarding and alarm monitoring will remain dominant. The non-residential market will remain the largest segment, while the institutional market grows the fastest. This study analyzes the \$54.5 billion US private security service industry, with forecasts for 2019 and 2024 by type, market and US region. The study also evaluates company market share and profiles industry players.

#3268.....May 2015.....\$5400

World Security Equipment

World demand for security equipment is forecast to increase 6.8 percent annually to \$126 billion in 2018. The fastest gains will be in developing areas, where security markets are relatively immature. Technological innovations and the integration of security equipment with electronic devices and building systems will aid sales. This study analyzes the \$90.2 billion world security equipment industry, with forecasts for 2018 and 2023 by product, market, world region, and for 14 countries. The study also evaluates company market share and profiles industry participants.

#3228.....March 2015.....\$6600

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

Fencing

US demand for fencing will rise 7.0 percent per year to \$9.0 billion in 2018, totaling 875 million linear feet. Metal will remain the dominant material while plastic and composite fencing will grow the fastest. The non-residential market will outpace the leading residential segment, based on strong gains in nonresidential building construction expenditures. This study analyzes the 717 million linear foot US fencing industry, with forecasts for 2018 and 2023 by material, market and US region. The study also evaluates company market share and profiles industry players.

#3224.....November 2014.....\$5300

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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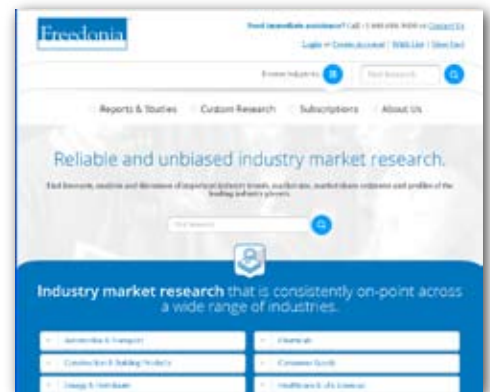
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