

Law Enforcement & Guarding Equipment

US Industry Study with Forecasts for 2020 & 2025

Study #3431 | August 2016 | \$4900



Law enforcement is challenged by the need for a balance between equipping officers with gear that will protect them (be it protecting them physically via body armor and riot gear or from litigation via body cameras) while also trying to manage the appearance of acts of excessive use of force by officers. There are also major concerns about the excessive costs associated with many newer products.

Population & urban-rural distribution affect trends

Demand for law enforcement and guarding equipment varies by region due to demographic differences such as population size and urban-rural distribution. Major urban areas represent a significant share of law enforcement officers employed in the US, as well as the majority of guards. As a result, the South and West -- which have large populations and a large number of urban areas -- represent the largest and most rapidly growing regional markets. Differences in state and local legislation, which may either limit, ban, or require the usage of certain products, also impacts demand.

Technology plays a complicated role

Technology is evolving faster than legislation and policies can keep up with. There are a number of items (license plate readers, body cameras, drones) that

agencies are already using because the technology is there and it works, but the policy-makers (at the agency level and at the local, state, and federal government levels) are struggling to keep up with them.

Newer technologies, primarily body cameras and drones, are expected to register strong increases in the number of units sold, though value demand will be limited to a degree by declining prices as manufacturers attempt to offer more cost-efficient products for budget-conscious agencies.

Study coverage

This study analyzes the US law enforcement and guarding equipment market. It presents historical demand data (2005, 2010, 2015) plus forecasts (2020, 2025) by product (duty gear, video surveillance cameras, communications equipment, body armor and riot gear, other electronic equipment, vehicle equipment, other safety equipment) and by regional US market. The study also considers market environment factors such as pricing dynamics, public safety, and legal and regulatory environments. It also assesses the industry structure, evaluates company market share, and profiles US industry players including L-3 Communications, 5.11, Point Blank, Smith & Wesson, TASER International, Safariland & WatchGuard Video.

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PRODUCTS

Body Cameras

Demand for body cameras is expected to continue to grow through 2020 to \$1.5 billion. Sales of these products are supported by many factors, including the availability of grants and other funding sources. Nonetheless, gains in value terms will represent a significant deceleration from the 2010-2015 period as prices for these products continue to fall. This decline in price will primarily be driven by competition among manufacturers on providing more affordable options for the tight budgets of law enforcement agencies.

Interest in body camera use among law enforcement officers picked up speed going into the 2010-2015 period. However, the use of these products was thrust into the national spotlight following an April 2014 police-involved shooting death of an unarmed black man in Missouri. Following this incident, many law enforcement agencies came under pressure from a variety of parties to use body-worn cameras as a way to keep officers in line and to capture video evidence of when they overstep their boundaries. Although the Ferguson incident propelled body camera usage, the discussion and implementation of body worn cameras has continued to be propelled by an ever growing list of police-related shootings, particularly of black men. Some of these incidents have gotten particularly widespread attention include the death of Michael Rice in November 2014 and the recent deaths of Philando Castile and Alton Sterling -- within the span of two days -- in July 2016.

The reasons for implementing the use of body cameras has become twofold. Citizens claim that officers wearing body cameras will know

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SAMPLE
TABLE

TABLE IV-13

WEST: LAW ENFORCEMENT & GUARDING EQUIPMENT MARKET (million dollars)

Item	2005	2010	2015	2020	2025
West Population (mil persons)					
\$ security/capita					
West Law Enforcement & Guarding Mkt					
Mountain					
Pacific					
% West					
Law Enforcement & Guarding Equipment					
Selected Metropolitan Areas					
Los Angeles-Long Beach, CA					
San Francisco, CA					
Riverside-San Bernardino-Ontario, CA					
Denver, CO					
Phoenix-Mesa, AZ					
San Diego, CA					
Seattle-Bellevue-Everett, WA					
Sacramento, CA					
Portland, OR					

Source: The Freedonia Group

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TABLE

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VIDEO SURVEILLANCE CAMERA DEMAND (million dollars)

Item	2005	2010	2015	2020	2025
Guards & Law Enforcement Officers (000)					
\$ video surveillance cameras/officer					
Video Surveillance Camera Demand					
License Plate Readers					
Body Cameras					
Stationary Cameras					
Vehicle Cameras					
% video surveillance cameras					
Law Enforcement & Guarding Equipment					

Source: The Freedonia Group

SAMPLE
TABLE

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Related Studies

Drones (UAVs)

Demand for unmanned aerial vehicles (UAVs), or drones, in the US is forecast to rise 10 percent per year through 2020 to \$4.4 billion, and the number of vehicles sold will more than double to 5.5 million. The military market currently accounts for the vast majority of demand in dollar terms, while the consumer market accounts for over 99 percent of all units sold. The study details the \$2.7 billion drones market, with demand forecasts for 2020 and 2025 by type and market. The study also analyzes company market share and profiles key US industry participants.

#3408.....June 2016..... \$5300

Education Security Market

US demand for security products and services in the education market will rise 3.4 percent annually to \$2.5 billion in 2020. Growth in education security spending will benefit from a rebound in educational building construction expenditures. This study analyzes the \$2.2 billion education security market, with forecasts for 2020 and 2025 for electronic products, mechanical products, and services. The study also considers market environment factors, assesses the industry structure, evaluates company market share and profiles US industry participants.

#3401.....April 2016..... \$5300

Mechanical Security Products

Sales of mechanical security products in the US will rise 5.4 percent yearly through 2020 to \$6.1 billion, driven by the large lock segment as it benefits from continued gains in building construction spending. Door security hardware will grow at an above average rate. The government/institutional and office/lodging markets will grow the fastest. This study analyzes the \$4.7 billion US mechanical security product industry, with forecasts for 2020 and 2025 by product and market. The study evaluates company market share and profiles industry competitors.

#3387..... February 2016 \$5300

Electronic Security Products

US demand for electronic security products is forecast to grow 7.0 percent annually through 2019 to \$16.2 billion. Technological advances will drive growth by boosting value demand via the incorporation of value-added features and by increasing market penetration. Video surveillance, access controls and alarms will be the fastest growing products. This study analyzes the \$11.6 billion US security product industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry players.

#3321..... October 2015 \$5400

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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