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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Demand for body cameras is expected to rise 3.2 percent annually through 2020 to $103 million dollars. Sales in volume terms are expected to continue rising at a rapid pace over that period as the number of agencies issuing these products increases. Volume sales will be further supported by many agencies choosing to expand their existing stock of body cameras for use with a wider number of officers. The availability of grants and other funding opportunities will buoy the spreading adoption. 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 a focus among manufacturers on providing more affordable options for the often tight budgets of law enforcement agencies.

Interest in body camera use among law enforcement officers began to pick up speed going into the 2010-2015 period. However, the use of these products was thrust into the national spotlight following an August 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 that have gotten particularly widespread attention include the death of Tamir 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 been twofold. Citizens claim that officers wearing body cameras will know...
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 98 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 $11.8 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

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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The Freedonia Group 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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- Chemicals
- Construction & Building Products
- Consumer Goods
- Energy & Petroleum
- Industrial Components
- Healthcare & Life Sciences
- Machinery & Equipment
- Metals, Minerals & Glass
- Packaging
- Plastics & Other Polymers
- Security
- Services
- Textiles & Nonwovens
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