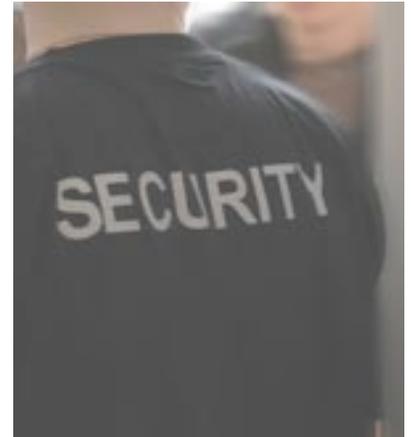


Global Security Services Market, 12th Edition

Industry Study with Forecasts for 2020 & 2025

Study #3451 | January 2017 | \$6700



Although reported crime rates are falling in a number of countries, there is a widespread perception that crime is rising. In developed areas, crime rates are generally falling despite widespread media reports of various crimes that can leave citizens feeling unsafe. The level of confidence in the ability of local police to protect people and property also impacts demand for security services. For instance, in some areas, residents believe that public safety officials are either stretched too thin to provide adequate protection or are themselves involved in corruption or violence.

China, India fastest growing countries, both doubling in size

China and India will post the most rapid national advances through 2020, with revenues in both countries roughly doubling in size. These countries will see combined global market share rise from 10 percent in 2015 to 15 percent in 2020, together representing nearly one-third of additional global demand over that period. In these two countries and elsewhere in developing areas, demand for security services is enabled by rising incomes.

Developed area gains to moderate

Developed areas such as the US, Western Europe, and Japan are typically home to more mature markets for private security services and will see more moderate gains in revenues through 2020. In these areas, the ongoing

proliferation of technologically advanced security systems will have a mixed impact on demand for security services.

Guarding service revenues to remain dominant

Guarding services represent the majority of global private security service revenues, accounting for 55 percent in 2015. Demand for guards is particularly strong in developing countries, where low labor costs make hiring guards more affordable than investing in technology-related services. End users rely on guards being a visible deterrent to potential perpetrators. The fastest advances will stem from less pervasive services such as security consulting, which is often linked to the use of complex and interoperable security systems.

Study coverage

This study analyzes global markets for private contractual security services, such as guard and guard patrol services; central station alarm monitoring services; armored car transport and related cash handling and automated teller machine (ATM) services (jointly termed cash-in-transit/CIT services); security consulting, private investigations, and other). It offers historical data plus forecasts for 2020 and 2025 for revenues by type and market in six regions and 21 countries. The study also details industry structure and evaluates company market share.

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WESTERN EUROPE

France: Security Services by Type

Guarding services account for the largest share of private security services in France, with 29 percent in 2015. Demand for these services will experience above average growth through 2020, fueled by rising interest among residential consumers. Historically, monitored alarms have faced significant competition from unmonitored alarms in residential settings, with as many as two-thirds of consumers choosing unmonitored alarms. However, insurance incentives for the use of alarms will continue to expand the base of end users providing opportunities for growth. Media reports about residential break-ins will also support gains; however, many French homeowners continue to believe that the average person's security risk does not warrant the installation of monitored alarm systems. As a result, products

Alarm monitoring services account for the next largest share of private security services demand in France, with 29 percent in 2015. Demand for these services will experience above average growth through 2020, fueled by rising interest among residential consumers. Historically, monitored alarms have faced significant competition from unmonitored alarms in residential settings, with as many as two-thirds of consumers choosing unmonitored alarms. However, insurance incentives for the use of alarms will continue to expand the base of end users providing opportunities for growth. Media reports about residential break-ins will also support gains; however, many French homeowners continue to believe that the average person's security risk does not warrant the installation of monitored alarm systems. As a result, products

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POLAND: SECURITY SERVICES MARKET OVERVIEW

Item	2005	2010	2015	2020	2025
Gross Domestic Product (bil 2014\$)					
per capita GDP					
Population (mil persons)					
% of population					
Urban Population (mil persons)					
Male Population (mil persons)					
15-24 years					
% 15-24 years					
Median Age (years)					
Unemployment Rate (% of workforce)					
Reported Crimes Per 000 Persons					
Building Construction (bil 2014\$)					
\$ security/000\$ GDP					
\$ security/urban capita					
\$ security/15-24 male capita					
Security Services Revenue (mil \$)					
000\$ revenues/employee					
Security Services Employment (000)					

Source: The Freedonia Group

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

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INDIA: SECURITY SERVICES REVENUE BY TYPE (million dollars)

Item	2005	2010	2015	2020	2025
Asia/Pacific Security Services Revenue % India					
India Security Services Revenue					
Guarding					
Alarm Monitoring					
Armored Transport					
Other					

Source: The Freedonia Group

Related Studies

Law Enforcement & Guarding Equipment

US sales of law enforcement and guarding equipment are forecast to rise 3.5 percent yearly through 2020 to \$1.2 billion. Growth will be fueled by the increasing number of guards and law enforcement officers. Demand will further benefit from the rising adoption of expensive, high technology products (e.g., license plate readers, body cameras, drones). This study analyzes the \$1.0 billion law enforcement and guarding market, providing demand projections for 2020 and 2025 by product and US region. The study also details industry structure and analyzes company market share.

#3431.....August 2016..... \$4900

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

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 nonresidential 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

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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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