



SECURITY



The Physical Security Business 2021 to 2026

ACCESS CONTROL, VIDEO SURVEILLANCE & INTRUDER ALARM/PERIMETER PROTECTION RESEARCH

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Physical
Security
Business
2021 to
2026



meemori

Synopsis

This report aims to assist all stakeholders and investors in the physical security industry in identifying business opportunities in growth sectors of the market; and forecasts demand to 2026

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Introduction

This Report is the New 2021 Definitive Resource for Access Control, Video Surveillance & Intruder Alarm / Perimeter Protection Market Research.

Over 18 months into the COVID-19 pandemic, and the global physical security market has demonstrated a remarkable degree of resilience, outperforming some other global technology markets and indeed beating our best case scenario projection from last year. The pandemic is helping to reshape the physical security industry, turbo-charging certain emerging business models, whilst it continues to make our societies safer; not just from the pandemic but also from crime and terrorism.

Our latest analysis of world sales of physical security products at factory gate prices indicates that world sales in 2021 have bounced back strongly year-on-year versus 2020, growing to over \$33.8 Bn, and we predict that the market should maintain a robust growth of nearly 7.2% CAGR over the next 5 years to 2026.

World Sales of Security Products by Type 2021



57.2%
VIDEO SURVEILLANCE
\$21.7BN



23.2%
ACCESS CONTROL
\$8.8BN



19.6%
INTRUDER ALARMS/
PERIMETER PROTECTION
\$7.4BN



This report is our 13th annual market analysis that brings together all the factors influencing this industry's future. We assess the structure and size of the combined physical security industry then break down the market by size of product type, sales by vertical sector and geographic region, and forecast sales to 2026. **It INCLUDES at no extra cost, a spreadsheet listing all major companies, acquisitions, and investments AND a graphics pack with high-resolution charts from the report.**

Key Questions Addressed:

What is the shape, size and structure of the global physical security market in 2021? How is it broken down into access control, video surveillance and intruder alarm / perimeter protection equipment? Where are the dominant geographic markets in the world? How are sales split between 16 different industry verticals?

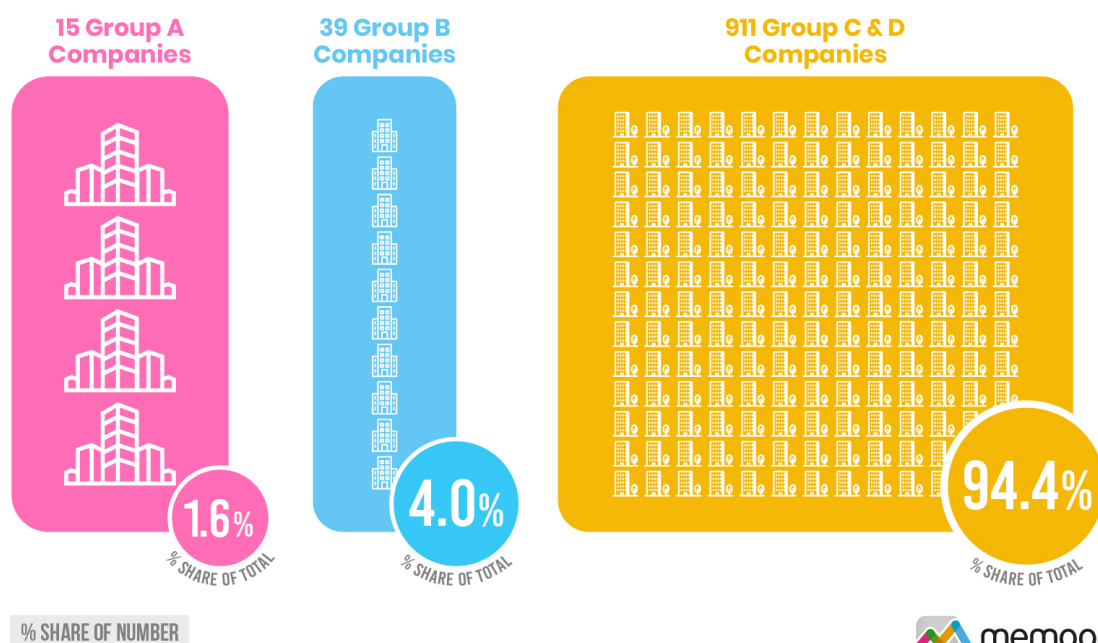
What are the main drivers for industry growth? How will the market grow over the next 5 years? Which technologies are helping to reshape this market and create new business models?

How have mergers and acquisitions impacted the industry over the last 15 years?

Historically, what have been the average multiples paid for physical security companies?

How much investment has the market attracted from venture capital and private equity?

Distribution of Sales by Major Grouping by Number of Companies



Within its 257 Pages and 34 Charts and Tables, The Report Presents All the Key Facts and Draws Conclusions, so you can Understand what is Shaping the Future of the Physical Security Industry:

Principal technology drivers of demand over the period include the growth in IoT and building systems integrations, rising demand for remote management and control,

particularly cloud-based ACaaS and VSaaS services, and AI based video analytics. All of these technologies are covered in detail in this report. Meanwhile macro market drivers such as crime, persistent terror threats, border disputes, and refugee crises will also continue to drive the adoption of physical security technologies.

The global COVID-19 pandemic has created a significant change to the distribution of demand by vertical over the last two years, some of which will be largely short-term in nature. Lockdowns, their resultant economic impacts and public concerns related to virus transmission have adversely affected sales in several markets including Retail, Leisure and Hotel verticals, and to a lesser extent Offices. Conversely, investment in healthcare and logistics related sectors has risen sharply.

The market for video surveillance products still makes up the largest proportion of physical security sales at 57%. The market has bounced back strongly, rising 14.5% year-on-year outperforming 2019 sales and hitting a projected \$21.65 billion for 2021. Moving forward, we expect growth from 2021 to 2026 to moderate back to a still healthy CAGR of 7.8%, with the total sales expected to rise to \$31.5 billion in 2026.

Physical security vendors are finally getting the message that threats to cyber security are capable of causing serious harm to their business, although major breaches still persist. Unless stakeholders invest in ensuring their products and systems are not vulnerable to cyber attack, they could face massive claims for damages and huge reputational harm. One of the **critical buying propositions of physical security is now** “What have you done to make this equipment less vulnerable to cyber attack and does it comply with current legislation?” The owners and operators of buildings, particularly those with large building estates, need to know that manufacturers and installers fully understand what needs to be done to reduce vulnerabilities.

Starting at only USD \$2,250 for a Single User License, this report provides valuable information into how physical security companies can develop their business strategy through mergers, acquisitions, and alliances.

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How to Order

The report is priced at **\$2,500 USD (Enterprise License) / \$2,250 USD (Single User License)**. It is delivered as an electronic file download, via email.

To order, or if you require further information please contact; **James McHale** - jim@memoori.com / +46 8 501 64 177

Alternatively you can order direct through our Website -

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