



The Physical Security Business 2022 to 2027

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

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Physical
Security
Business
2022 to
2027



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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 2027

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Introduction

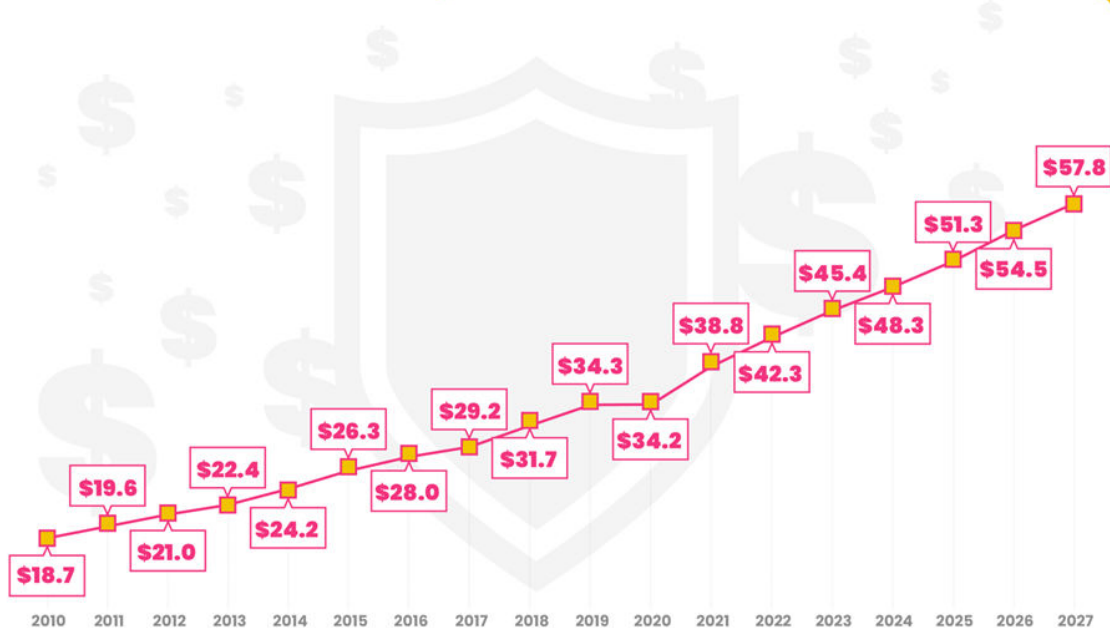
This report is our 14th annual market analysis that brings together all the factors influencing this industry's future. We assess the structure and size of the combined physical security industry then break down the market by product type, sales by vertical sector and geographic region, and forecast sales to 2027. **It INCLUDES at no extra cost, a spreadsheet listing all major companies categorized by revenue, acquisitions, and investments AND a graphics pack with high-resolution charts from the report.**

The report shows that the market for Physical Security products has demonstrated a remarkable degree of both resilience and adaptability over the course of the COVID-19 pandemic, with recovery proving particularly strong in 2021 for most major players in the market.

Memoori estimates annual revenues from the physical security product market should increase 9.13% in 2022, rising to \$42.3Bn, and predict that between 2023 and 2027, growth will average around 6.5% per annum.

Fig 1.4

World Sales of Security Products 2010–2027 (\$b)



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Key Questions Addressed:

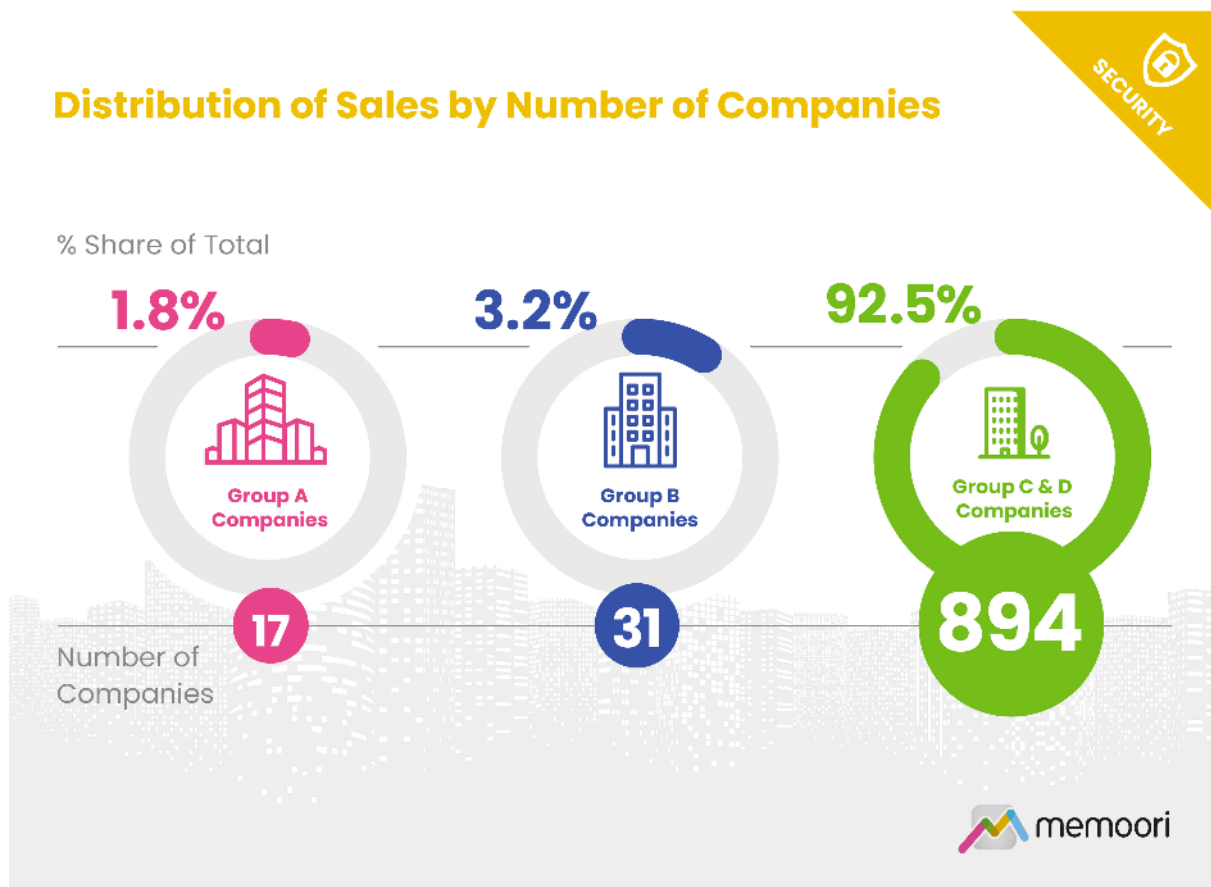
What is the global physical security market's shape, size and structure in 2022? How is the market broken down into Access Control, Video Surveillance and Intruder Alarm/Perimeter

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 are mergers, acquisitions and investments impacting the industry? How does acquisition activity stack up against previous years both in terms of value and volume? How much investment has the market attracted from venture capital and private equity this year?

Distribution of Sales by Number of Companies



Within its 234 Pages and 28 Charts and Tables, This Report Presents All the Key Facts and Draws Conclusions, so you can Understand what is Shaping the Future of Electronic Systems in the Security Industry:

The Chinese video surveillance market continues to dominate global sales accounting for just under one-third of the total, followed by North America with just over a quarter of the global market. China's Sharp Eyes project mandated 100% surveillance coverage for public areas and key industries by the end of 2020. While the program (part of the 13th Five-Year plan released in 2016) technically came to an end in 2020 delays in project rollout due to the pandemic mean some investments continued into 2021. The winding down of the Sharp

Eyes program may indicate a decline in future government investment in the domain, but we do still expect robust levels of government investment and support for innovation in the sector to continue.

Memoori's Q1 2021 analysis of Artificial Intelligence (AI) in Smart Buildings found that the Security & Access control market, and particularly video analytics generates the lion's share of overall AI revenues in smart buildings, representing just under 50% of total sales in 2020 at \$558 million.

An enormous amount of investment has been ploughed into the development and deployment of the latest generation of broadband cellular network technology, known as 5G. Many analysts and industry observers contend that the proliferation of 5G will have a major impact on the video security market, arguing that in the years to come, we will see the proliferation of large networks of wireless cameras streaming ultra-high-definition video in real-time. We do not share this view. In fact, as of 2022, we see very little momentum or market appetite from either camera manufacturers, integrators or end users for the deployment of 5G wireless surveillance usage at scale. We estimate that the introduction of 5G for video surveillance data transmission will take at least another 5 years to achieve the levels of coverage, reliability and falls in cost to have any kind of real impact.

Over the last 20 years, the average annual total of all acquisitions was over \$6.7 Billion, and the average number of deals was 42. In 2022 we have identified a total of 43 deals, a moderate rise from the 38 from last year. **The total estimated deal value came in at just over \$9.8 billion, which ranks 2022 as the 4th highest of any year in the last 20, with a total that is 45% higher than the annual average of over \$6.7 billion.**

Starting at only USD \$2,500 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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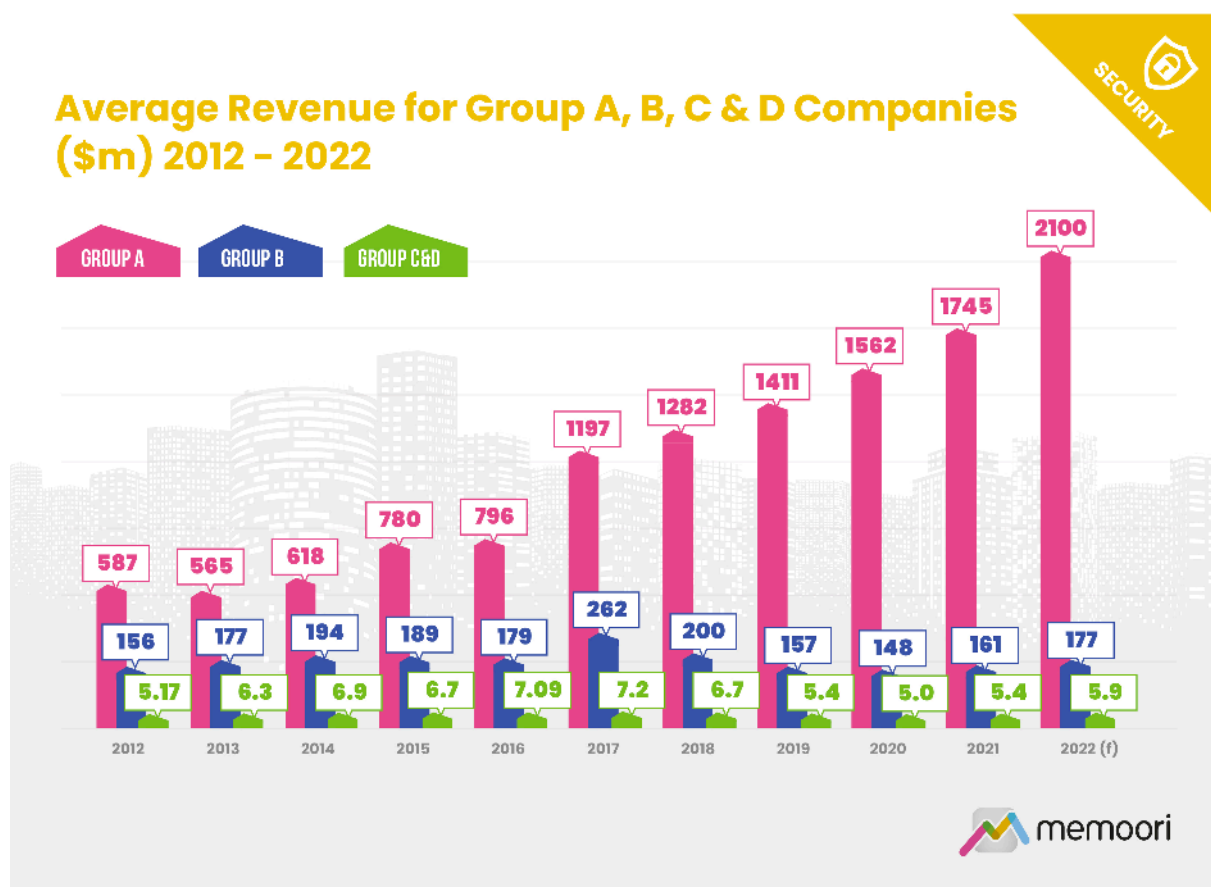
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Spreadsheet

The World's Major Physical Security Companies 2022

Physical Security Acquisitions - October 2021 to the End of September 2022

VC and Private Equity Investments



How to Order

The report is priced at **\$2,750 USD (Enterprise License) / \$2,500 USD (Single User License)**.

It is delivered as an electronic file download, via email.

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