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Electronic Security and Access Control Market – UK 2011 – 2015 Analysis

New AMA report provides a major review of the UK Electronic Security and Access Control Market

“The recent civil unrest and riots in several major cities may prompt a review of the current CCTV systems installed by retailers and local councils. CCTV has proved a useful tool for identifying those responsible for the vandalism and theft, while also highlighting the poor quality of some CCTV images.”

A brief summary of the report is included on the following page.

Priced at £665, the report is currently available from AMA Research Ltd, Telephone 01242 235724 or e-mail at sales@amaresearch.co.uk.

Editors Note:

Attached is a summary of the report. Please use brief extracts if you wish, **but we would request that references to company market shares are not published without our prior permission.**

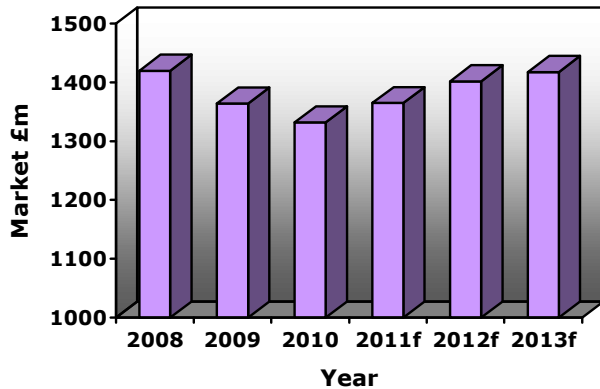
If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Chris Moore or Keith Taylor on (01242) 235724.

Please include our web address and telephone number on any review printed, it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

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The UK Electronic Security and Access Control Market
2008- 2013 (£m at End-User Prices)



There was a decline in the market for electronic security and access control products following the economic downturn, largely due to the significant fall in construction levels in the private sector. Both domestic and commercial demand for electronic security products has been impacted by the economic downturn and resultant lower levels of investment and expenditure in the private sector.

There has been a significant decline in private construction levels in the 2008-10 period and in that period the electronic security market has become increasingly reliant on public sector expenditure for both new installations and replacements. Installations in the public

sector have gained share in recent years following higher levels of expenditure. New construction and RMI expenditure in the education and health sectors has been buoyant in recent years supporting underlying demand in the electronic security sector.

A high level of price competition has also contributed to the overall decline in market value over the last two years and suppliers are experiencing tighter margins and increasing competition. End-users have become increasingly focused on price and value for money. The proliferation of cheaper imports, and falling prices in the technology sector, as well as the use of compulsory competitive tendering (particularly in the public sector) has also affected overall development of the market in value terms.

The market for **intruder alarms** is mature, pricing remains competitive and consequently growth levels are subdued. The **CCTV** sector performed relatively well during the early stages of the recession, with prolonged production shut-downs in sectors such as automotive resulting in increased security requirements. The market for **Access Control** equipment has remained relatively buoyant up to 2009 supported by demand from the education and health sectors and the residential and commercial sectors prior to the recession. There has been less price competition in this sector compared with CCTV, which has supported higher levels of value growth.

Modest growth is expected within the UK electronic security products and systems market in the short term, given the maturity of some product sectors and the impact of the current economic climate on some key end-use markets.

In the short to medium term future, the prospects for the overall electronic security market are more positive. While there have been a number of budget cuts following the spending review which will undoubtedly impact on large scale projects, some public sectors will continue to invest in electronic security systems, supported by the continued threat of terrorism and essential upgrades to estates.

The recent civil unrest and riots in several major cities may prompt a review of the current CCTV systems installed by retailers and local councils. CCTV has proved a useful tool for identifying those responsible for the vandalism and theft, while also highlighting the poor quality of some CCTV images.

AMA Research's report "**Electronic Security and Access Control Market Report - UK 2011-2015 Analysis**" is available in hard copy or electronic format for £665 and can be ordered online at www.amaresearch.co.uk or by calling 01242 235724.