

## Electronic Security Systems Market Report - UK 2018-2022

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### Introduction and Overview

The 6th Edition of the '**Electronic Security Systems Market Report- UK 2018-2022**' incorporates analysis of the CCTV, Access Control and Intruder Alarm markets along with a review of the installation, servicing and monitoring of electronic security systems. Written by marketing professionals, the report provides suppliers with a detailed review of this changing market, influenced by capital expenditure in key end-use sectors and technological developments.



### Key issues analysed in the report

- Overall electronic security market size - products and services.
- Recent market developments and future prospects to 2022.
- Market size and sector reviews for Intruder Alarms, CCTV and Access Control.
- Key influences, product trends and end-use applications.
- Main suppliers and distribution channels.

### Areas of particular interest

- Buoyant construction levels, particularly in the private sector, have driven sales of CCTV, access control and intruder alarms.
- Technological developments have continued to drive the replacement market, particularly for CCTV. Chinese manufacturers have shifted their focus from low pricing to R&D.
- Increasing focus on overall lifecycle cost of a system including product, installation, operational costs, monitoring and management costs.
- Greater involvement of IT software and system providers in the electronic security industry driven by technological developments.
- Increasing emphasis on providing a full product and service package.

### Some of the companies included:

ADI Global Distribution, Allegion UK Ltd, Assa Abloy, Avigilon, Axis Communications, Bosch Service Solutions Ltd, Canon,

Dahua Technology, Dormakaba, DVS Ltd, Dynamic CCTV, Enterprise Security Distribution, FLIR Systems, Hanwha Techwin Ltd, HID Corporation, Hikvision, Honeywell Security UK, IndigoVision, Johnson Controls International, NetVu, Norbain Holdings, Oprema Security, Optex (Europe) Limited, Panasonic Corporation, Paxton Access, Pyronix, Risco Group, Swann Communications, Synectics, TDSi, Texecom Ltd, Uniview, Vanderbilt International, Videcon, Yale and more.

## **THE MARKET FOR ELECTRONIC SECURITY**

- Overview of electronic security market for products and services, plus analysis of underlying trends and key influences on each of the main sectors of the security market - Intruder Alarms, CCTV and Access Control.
- Historical background - development of the market, influencing factors, economic influences, etc.
- Market size by value for electronic security products and services - 2013-2018 - market prospects and factors influencing future growth potential with forecasts up to 2022.
- Key influences and trends on the development of the market - impact of the economy, technological developments, supply chain review and trends within the manufacturing and construction sectors.

## **ELECTRONIC SECURITY PRODUCTS AND SERVICES**

- Value share of the market (products and services) accounted for by Access Control, Intruder Alarm and CCTV in 2017 and forecasts for 2022, background and current trends in addition to the anticipated trends within the various sectors.
- Product features and trends, advantages and disadvantages offered by the various types of technology and key application areas. Growth of access control/CCTV, security, crime, general surveillance issues, IT, Mobile devices etc.
- CCTV equipment/product market size from 2013-2022, key market drivers, supplier development, product trends.
- Access Control equipment/product market size from 2013-2022, key market drivers, product trends and suppliers.
- Intruder Alarm equipment/product market size from 2013-2022, key market drivers, product trends and applications.

## **END-USE APPLICATIONS AND DRIVERS**

- Mix of security system installations by end-use sector for 2016 and 2018.
- Principal end use sectors - share taken by key sectors including commercial, industrial, public sector, health and education 2017.
- Trends within the key end-use sectors and related products and services, e.g. emphasis on additional services including after-sales support, growth of integrated and networked systems.

## **SUPPLY & DISTRIBUTION STRUCTURES**

- Review of the major channels and trends, including direct supply, specialist distributors, electrical wholesalers, etc. Corporate activity, and specification and installation.
- Review of key companies including equipment manufacturers, distributors and installers - company profiles, turnover, key characteristics.

## **Report Summary**

The market for electronic security products and services has improved considerably since 2015, following several years of relatively poor performance. The upturn began in 2015 and accelerated in 2016, driven by technological advancements

increasing replacement demand, along with the buoyant construction sector. Growth continues at a strong level in 2017 with 2018 also looking positive. The level of price competition has also stabilised in some sectors.

The UK electronic security market is mature, meaning that replacement demand is a key feature and accounts for the majority of end-user sales. Additionally, despite replacement demand being a key driver, strong growth in construction output since 2015 has seen new installations increase. Buoyant construction output in key end use sectors such as offices, industrial and more recently, entertainment and leisure, have supported new installations of CCTV and access control.

Technological developments have continued to drive the replacement market, particularly for CCTV. Chinese manufacturers have shifted their focus from low pricing to R&D which has been a key driver in terms of technological development. Key technological trends relate to image quality, artificial intelligence (AI), deep-learning analytics, cloud-based solutions, and integration with other security systems.

A variety of organisations is involved in the security industry. At the manufacturing level, these include manufacturers of electronic equipment, in addition to specialist manufacturers and IT developers. The specialist security equipment manufacturers range from large organisations providing a full service package, including all security equipment, installation, servicing and monitoring, to companies focusing on product development, such as those in the camera, biometric or IT sector.

The prospects for the electronic security sector overall are reasonably good in the short to medium term. Value growth is likely to come from increasing adoption of new technologies in both the new and replacement sectors. While construction output growth is expected to ease over the next 2-3 years, output remains relatively high by historical standards and this should continue to provide opportunities for manufacturers and installers of electronic security equipment

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