

Data Center Physical Security Market - Global Outlook & Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Data Center Physical Security Market Report

The data center physical security market by investment is expected to grow at a CAGR of 7.42% during 2021–2026.

The data center market is witnessing strong growth in the development of multiple large facilities. The data center market is mainly dominated by colocation providers, followed by internet and cloud service providers. With the increasing development of sophisticated technology and vast amounts of data, the data center security market is becoming essential for operators. Companies are increasingly working towards ensuring that customer data is protected by installing physical security measures. For instance, SIFY Technologies is investing in facilities across India equipped with physical security systems such as video surveillance, motion detection, and multi-level access control along with physical security guards.

The following factors are likely to contribute to the growth of the data center physical security market during the forecast period:

Increasing Construction of Hyperscale Data Centers

Rising Colocation Investment Across Data Centers

Advancements In Video Analytics and Cloud-Based Analytics

Use of Anti Climb Perimeter Security

The study considers the present scenario of the data center physical security market and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

COVID-19 IMPACT ON GLOBAL DATA CENTER SECURITY MARKET

The local and global vendors manufacturing and supplying security infrastructure faced a significant challenge during the pandemic. During COVID-19, several lockdowns were imposed by the government across the globe. As in some of the region data centers were considered essential services, the working continued with 50% of employee capacity. The threat of cyber-attack was high, and the vendors started to provide high-security solutions to the operators. Some vendors such as Honeywell International, Johnson Controls International, Legrand, Siemens, Bosch Security Systems, Hangzhou Hikvision Digital Technology, and Secure I.T. Environments provide several advanced physical security infrastructures for the data centers.

MARKET TRENDS AND SEGMENTS

An increase in the number of edge data center facilities deployed will increase the demand for physical security solutions such as video surveillance and access control systems.

With advances in video surveillance, cloud provider security, and high-quality cameras are capturing and collecting vast amounts of data. Cloud-based video analytics has become the latest trend in physical security.

Cloud computing and edge processing will drive the adoption of advanced video content analytics in the coming years.

Many hyperscale operators have adopted significant physical security measures to ensure the safety of their facilities.

Remote monitoring using Artificial Intelligence (AI) is increasingly being done to ensure advanced security on the premises.

The demand for video surveillance systems is on the rise as data center investments are increasing YOY. The global video surveillance security market is expected to reach \$338.7 million in 2026.

The installation of racks in existing data centers is boosting the adoption of cabinet security solutions. The global cabinet security market will grow at a CAGR of 7.36% by 2026.

Most investments in physical security solutions among enterprise data centers will be through hyperscale self-built facilities and on-premise containerized data center developments in developing countries.

Market Segmentation by Product

Video Surveillance

Access Control

Other Physical Security

Market Segmentation by Security Layers

Perimeter Security

Building Security

Datahall Security

Cabinet Security

Market Segmentation by End-Users

Colocation Data Centers

Enterprise Data Centers

GEOGRAPHICAL ANALYSIS

North America is a significant location for investments in the data center physical security market. The region is a crucial driver and acts as an incumbent for any new technological innovation in the data center arena. The US is one of the most developed markets that will increase the investment in physical security systems in facilities across the region. The data center physical security market in the US is expected to reach USD 429.3 million by 2026. Over 50 hyperscale facilities were active in North America in 2020, which operate at a power capacity of over 20 MW and will create growth opportunities for the vendors in the region.

Market Segmentation by Geography

North America

US

Canada

Latin America

Brazil

Other Latin America Countries

Western Europe

UK

Germany

France

Netherlands

Ireland

Other Western European Countries

Nordic

Denmark

Norway

Sweden

Finland & Iceland

Central & Eastern Europe

Russia & CZECH Republic

Poland & Austria

Other Central & Eastern European Countries

Middle East

Gulf Corporation Council (GCC)

Other Middle Eastern countries

Africa

South Africa

Kenya

Other African countries

APAC

China & Hong Kong

Australia & New Zealand

India

Japan

Rest of APAC

Southeast Asian

Singapore

Indonesia

Malaysia

Thailand

Other Southeast Asian Countries

COMPETITIVE LANDSCAPE

Rapidly developing technologies and innovation in the market are compelling several vendors to offer more innovative solutions to the data center industry. Vendor partnerships with modular service providers are essential for their revenue growth. Some global providers provide solutions that will give them an edge over others in winning data center security installation and commissioning projects. The data center physical security market share is likely to grow in developing regions with more security threats. It is observed that global vendors are partnering with local vendors to capture the new growing market and generate more revenue till the market gets matured.

Key Players

ASSA ABLOY

Axis Communications

ABB

Alcatraz

Bayometric

Boon Edam

Bosch Security Systems (Robert Bosch)

BioConnect

Convergint Technologies

Cisco Systems

CLD FENCING

Dahua Technology

Digitus Biometrics

Eagle Eye Network

Hangzhou Hikvision Digital Technology

Honeywell International

Horton Automatics

Instor

Johnson Controls International

Kisi

Legrand

Pacific Control

Pelco

Puffin Solutions

Secure I.T. Environments

Siemens

Schneider Electric

Southwest Microwave

SUPREMA

Verkada

WireCrafters

KEY QUESTIONS ANSWERED:

1. How big is the Data Center Physical Security Market?
2. What are the major factors driving the Physical Security Industry?
3. What is the COVID-19 impact on the Physical Security market?
4. What are the opportunities and latest trends of the Data Center Physical Security market?
5. Who are the key players for the Data Center Physical Security market?

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