

Mechanical and Electromechanical Locks Market - Global Outlook and Forecast 2020-2025

<https://marketpublishers.com/r/MABB2D7F2234EN.html>

Date: August 2020

Pages: 273

Price: US\$ 3,500.00 (Single User License)

ID: MABB2D7F2234EN

Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Mechanical and Electromechanical Locks Market Report

The mechanical and electromechanical locks market by revenue is expected to grow at a CAGR of over 4% during the period 2019–2025.

The global mechanical and electromechanical locks market is expected to witness moderate growth during the forecast period. The market for new locks and digital access control systems is mainly driven by the demand for new access points, door installations, as well as renovation activities to increase the security of homes and commercial premises, including retail, hospitality, recreational facilities. Most commercial spaces are implementing latest infrastructure and technology to improve aesthetics, while ensuring maximum security and convenience, which is boosting the demand for electromechanical and networked locking systems. The demand for new safety system is driven by the installation of new fire-rated and energy efficient doors in developed countries, which boost the demand for mechanical and electromechanical locks. Fire rated as well as thermally efficient doors can prove highly beneficial for industrial spaces and investments in production sites are expected to contribute in the growth of the electronic locks market globally.

The rapid spread of the COVID-19 pandemic in early 2020 has greatly affected the global construction, manufacturing, and industrial outlook. The momentum for new orders and the expansion of industrial capabilities have reduced across the world both in terms of production. Stringent lockdowns from local and national governments have restricted supply, production, and logistics activities of finished goods.

The following factors are likely to contribute to the growth of the mechanical and electromechanical market during the forecast period:

Wireless access Control and Locking

High Potential in Emerging Markets

Growing Construction in Commercial Sector

Coworking Spaces Driving Demand of Digital Locks

The study considers the present scenario of the mechanical and electromechanical locks market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Mechanical and Electromechanical Locks Market Segmentation

The global mechanical and electromechanical locks research report includes a detailed segmentation by type, installation, end-users, and geography. The mechanical locks segment accounted for 60% of the mechanical and electromechanical locks market shares in 2019. A widespread adoption worldwide and high compatibility with common door type are the major factors driving the market growth. The growth of mechanical systems is proportional to the installation of manual doors. Automatic and glass doors have mechanical ones installed in retail outlets and corporate premises, which are boosting the demand across the globe. They are witnessing innovations in terms of materials, proofing, and protection.

In 2019, the replacement segment for existing locking and access control systems accounted for 65% of the mechanical and electromechanical locks market share. The demand for replacement doors is higher in renovation and retrofit activities, thereby driving the demand for replacement locks. APAC and Europe have led the market for replacement systems as a majority of the existing commercial building stock is not energy efficient. North America follows Europe in terms of replacement systems as building owners in the region seek advanced access control systems in their buildings and homes. The demand for replacement systems is directly connected to the replacement of doors as well as the growing trend of do-it-yourself (DIY) activities and

the rising need for advancing security. In terms of replacement demand for locks, the current trend is energy efficiency, which brings the overall fenestration of buildings.

The demand for locks in hotels typically varies by region and hotel size. The penetration of electromechanical systems in large hotel chains in developed countries as well as tourist hotspots averaged around 70% in 2019; whereas, hotels, lodges, and resorts in emerging countries and low budget destinations witnessed a high share for mechanical systems. The revenue potential for mechanical systems in the hospitality segment is improving as the demand is rapidly skewing toward higher revenue variants such as mortise locks. Automatic doors, smart door locks, and smart locks market is gaining immense popularity over the years, thereby becoming mainstream products in the hospitality locking systems.

The corporate segment is likely to grow at a steady rate from 2023 through 2025, as the global mechanical and electromechanical locks market overcomes the COVID-19 pandemic and corporate offices are back with full capacity, thus boosting investments in new construction of office space as well as renovation and retrofitting in access control systems. The corporate sector is expected to follow the hospitality segment in demand for electronic locks and network access control systems. There is large potential for energy-efficient doors in renovation of corporate buildings as air conditioning and lighting account for the maximum power usage in these buildings.

Segmentation by Type

Mechanical

Electromechanical

Segmentation by Installation

Replacement

New Construction

Segmentation by End-user

Hospitality

Corporates

Retail

Residential

Healthcare

Education

Others

INSIGHTS BY GEOGRAPHY

In the APAC mechanical and electromechanical locks market, the growth is mainly driven by China, South Korea, Japan, Australia, and India. Strong economic growth, coupled with the rise in residential and non-residential construction activities and increase in disposable incomes, has primarily supported the growth of the market in the region. The region remains a promising market for both mechanical and electromechanical systems. Comprising the most emerging economies in world - China and India, the APAC region is expected to witness a considerable investor attention in both residential and commercial building construction activities. APAC also constitutes about 60% of the world's population, which is growing at an annual rate of 1.3%. Moreover, APAC comprises a large millennial population, especially in countries such as China and India. The APAC market holds a key area of interest for building construction business vendors due to the high infrastructure demand across the region. As the region will witness an increasing investments and activities in new construction, renovation, and retrofit activities, it holds handsome potential for new revenue generation for both mechanical and electromechanical systems.

Segmentation by Geography

North America

US

Canada

Europe

UK

Germany

France

Spain

Italy

APAC

China

Japan

South Korea

Australia

India

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

Turkey

UAE

INSIGHTS BY VENDORS

The global mechanical and electromechanical locks market is dominated by several small and medium scale companies. In North America and Europe, domestic and long-established vendors enjoy high brand loyalty and strong market positions. Established large vendors offer locks with longer life cycles and an existing large base of installed systems present them with stable demand growth prospects in replacement activities as well. In emerging countries, regulatory standards for safety systems and strong national brands are less common. Moreover, with rising traction of innovative and high-quality mechanical as well as electromechanical systems growing in emerging countries, these markets hold high potential for entry of multinational vendors, especially in the field of electromechanical locks. Vendors are expected to pursue growth by acquisitions as there are numerous small-scale vendors.

Prominent Vendors

ASSA ABLOY

Dormakaba

Allegion

Other Prominent Vendors

GEZE

WSI Industries Inc.

Gretsch-Unitas (G-U)

Hager Group

DOM Security

ISEO

Lawrence Hardware

Dynasty Hardware

Hampton Products International

Tell Manufacturing

Cal-Royal

Godrej Group

Oubao

ABUS

Guangdong Archie Hardware

Deltana Enterprises

Kason Hardware

Rejuvenation

PRIME-LINE Products

Brisant-Secure

Southco

SAFETRON

PERCo

KEYU Intelligence Co (HUNE)

KIWI

Alban Giamoco

Key Questions Answered

1. What is the mechanical and electromechanical locks market size and growth rate during the forecast period?
2. What are the factors impacting the growth of the mechanical and electromechanical locks market shares?
3. Which lock type/ end-user type/region is generating the largest revenue in the Europe region?
4. Who are the leading vendors in the mechanical and electromechanical locks market, and what are the Assa Abloy's market shares?
5. What is the impact of the COVID-19 pandemic on the mechanical and electromechanical locks market?

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