

Physical Security Market Analysis By Component (Hardware, Software, Services), By Application (Transportation, Government, Corporate, Hospitality, Energy, Retail, Industrial, Control Centers, Chemical Facilities) And Segment Forecasts To 2020

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Abstracts

The global physical security market is expected to reach USD 110.09 billion by 2020. Increasing budget allocation for physical security on account of growing security concerns is expected to boost the physical security market. Increased migration towards cloud-based security systems and convergence in applications are expected to impact market dynamics. Smart devices, infinite storage devices, next-generation analytics, and ubiquitous sensors are among the emerging technologies in the physical security market.

Cloud-based systems serve various kinds of services including Internet of Things (IoT), mobile internet connections, electronic security and third-party security practices. Smart cities are expected to be governed and managed by these smart facilities over the forecast period. Increased adoption of security systems in business organizations is expected to favorably impact market growth. However, device interoperability issues and privacy concerns against installation of physical security systems may restrain the market. Security compliances issued by international bodies and stringent government regulations is the key opportunity for the market.

Further key findings from the study suggest:

Physical security hardware systems accounted for over 70% of the market in 2013; under these products, access control has the dominant share due to sabotages on critical infrastructure zones and increasing terrorist attacks. Intrusive detection &

prevention sub-segment is expected to grow over the forecast period.

Transportation was the dominant application segment in 2013; a trend that is expected to continue over the forecast period. This can be attributed to effective transport management system and continued investment in infrastructure. Government applications are expected to witness high growth over the next six years.

North America accounted for over 30% of the global physical security market in 2013; Asia Pacific is estimated to exhibit high growth through the forecast period. This can be attributed to shift towards security integration in developing markets, favorable government initiatives and high growth verticals generating demand for physical security.

Key participants operating in the market include Honeywell Security Group, Cisco Systems Inc., Genetec Inc, Morpho SA, Bosch Security Systems Inc and Axis Communication AB. These manufacturers have started developing products targeted at network-based technologies; additionally, geographical expansion is expected to be a key growth strategy.

For the purpose of this study, Grand View Research has segmented the global physical security market on the basis of component, application and region:

Physical Security Component Outlook (Revenue, USD Billion, 2012 – 2020)

Hardware

Intrusion Detection & Prevention

Access Control

Others

Software

PSIM

Management & modeling software

Services

Physical Security Application Outlook (Revenue, USD Billion, 2012 – 2020)

Transportation

Government

Corporate

Hospitality

Energy

Retail

Industrial

Control Centers

Chemical Facilities

Others

Physical Security Regional Outlook (Revenue, USD Billion, 2012 – 2020)

North America

Europe

Asia Pacific

RoW

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