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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 &

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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

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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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Contents

CHAPTER 1. EXECUTIVE SUMMARY

1.1. Physical security - Industry Summary and Critical Success Factors (CSFs)

CHAPTER 2. PHYSICAL SECURITY INDUSTRY OUTLOOK

2.1. Market Segmentation
2.2. Market Size and Growth Prospects
2.3. Physical security Value Chain Analysis
2.4. Physical security Market Dynamics
  2.4.1. Market Driver Analysis
  2.4.2. Market Restraint Analysis
2.5. Key Opportunities Prioritized
2.6. Industry Analysis - Porter's
2.7. Physical security - Company Market Share Analysis, 2013
2.8. Physical security Market PESTEL Analysis, 2013

CHAPTER 3. PHYSICAL SECURITY COMPONENT OUTLOOK

3.1. Software
  3.1.1. Global market estimates and forecasts, 2012 - 2020
3.2. Hardware
  3.2.1. Global market estimates and forecasts, 2012 - 2020
3.3. Services
  3.3.1. Global market estimates and forecasts, 2012 - 2020

CHAPTER 4. PHYSICAL SECURITY APPLICATION OUTLOOK

4.1. Transportation
  4.1.1. Global market estimates and forecasts, 2012 - 2020
4.2. Government
  4.2.1. Global market estimates and forecasts, 2012 - 2020
4.3. Corporate
  4.3.1. Global market estimates and forecasts, 2012 - 2020
4.4. Hospitality
  4.4.1. Global market estimates and forecasts, 2012 - 2020
4.5. Energy

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4.5.1. Global market estimates and forecasts, 2012 - 2020
4.6. Retail
4.6.1. Global market estimates and forecasts, 2012 - 2020
4.7. Industrial
4.7.1. Global market estimates and forecasts, 2012 - 2020
4.8. Control Centers
4.8.1. Global market estimates and forecasts, 2012 - 2020
4.9. Chemical Facilities
4.9.1. Global market estimates and forecasts, 2012 - 2020
4.10. Others
4.10.1. Global market estimates and forecasts, 2012 - 2020

CHAPTER 5. PHYSICAL SECURITY REGIONAL OUTLOOK

5.1. North America
5.1.1. Physical security market by component, 2012 - 2020
5.1.2. Physical security market by application, 2012 - 2020
5.2. Europe
5.2.1. Physical security market by component, 2012 - 2020
5.2.2. Physical security market by application, 2012 - 2020
5.3. Asia Pacific
5.3.1. Physical security market by component, 2012 - 2020
5.3.2. Physical security market by application, 2012 - 2020
5.4. RoW
5.4.1. Physical security market by component, 2012 - 2020
5.4.2. Physical security market by application, 2012 - 2020

CHAPTER 6. COMPETITIVE LANDSCAPE

6.1 Anixter
6.1.1 Company Overview
6.1.2 Financial Performance
6.1.3 Product Benchmarking
6.1.4 Strategic Initiatives
6.2 Assa Abloy AB
6.2.1 Company Overview
6.2.2 Financial Performance
6.2.3 Product Benchmarking
6.2.4 Strategic Initiatives

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6.3 Axis Communications AB
6.3.1 Company Overview
6.3.2 Financial Performance
6.3.3 Product Benchmarking
6.3.4 Strategic Initiatives
6.4 Bosch Security Systems Inc
6.4.1 Company Overview
6.4.2 Financial Performance
6.4.3 Product Benchmarking
6.4.4 Strategic Initiatives
6.5 Cisco Systems Inc.
6.5.1 Company Overview
6.5.2 Financial Performance
6.5.3 Product Benchmarking
6.5.4 Strategic Initiatives
6.6 Computer Sciences Corporation (CSC)
6.6.1 Company Overview
6.6.2 Financial Performance
6.6.3 Product Benchmarking
6.6.4 Strategic Initiatives
6.7 EMC Corporation
6.7.1 Company Overview
6.7.2 Financial Performance
6.7.3 Product Benchmarking
6.7.4 Strategic Initiatives
6.8 Genetec Inc
6.8.1 Company Overview
6.8.2 Financial Performance
6.8.3 Product Benchmarking
6.8.4 Strategic Initiatives
6.9 Hewlett-Packard
6.9.1 Company Overview
6.9.2 Financial Performance
6.9.3 Product Benchmarking
6.9.4 Strategic Initiatives
6.10 HikVision Digital Technology Co., Ltd.
6.10.1 Company Overview
6.10.2 Financial Performance
6.10.3 Product Benchmarking

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6.10.4 Strategic Initiatives
6.11 Honeywell Security Group
6.11.1 Company Overview
6.11.2 Financial Performance
6.11.3 Product Benchmarking
6.11.4 Strategic Initiatives
6.12 IBM Corporation
6.12.1 Company Overview
6.12.2 Financial Performance
6.12.3 Product Benchmarking
6.12.4 Strategic Initiatives
6.13 McAfee Inc
6.13.1 Company Overview
6.13.2 Financial Performance
6.13.3 Product Benchmarking
6.13.4 Strategic Initiatives
6.14 Morpho SA
6.14.1 Company Overview
6.14.2 Financial Performance
6.14.3 Product Benchmarking
6.14.4 Strategic Initiatives
6.15 NICE Systems Ltd.
6.15.1 Company Overview
6.15.2 Financial Performance
6.15.3 Product Benchmarking
6.15.4 Strategic Initiatives
6.16 Pelco Inc.
6.16.1 Company Overview
6.16.2 Financial Performance
6.16.3 Product Benchmarking
6.16.4 Strategic Initiatives
6.17 Schneider Electric
6.17.1 Company Overview
6.17.2 Financial Performance
6.17.3 Product Benchmarking
6.17.4 Strategic Initiatives
6.18 Siemens AG
6.18.1 Company Overview
6.18.2 Financial Performance

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6.18.3 Product Benchmarking
6.18.4 Strategic Initiatives
6.19 Tyco International Ltd
6.19.1 Company Overview
6.19.2 Financial Performance
6.19.3 Product Benchmarking
6.19.4 Strategic Initiatives
6.20 VidSys Inc
6.20.1 Company Overview
6.20.2 Financial Performance
6.20.3 Product Benchmarking
6.20.4 Strategic Initiatives

CHAPTER 7. METHODOLOGY AND SCOPE

7.1. Research Methodology
7.2. Research Scope & Assumption
7.3. List of Data Sources

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List Of Tables

LIST OF TABLES

1. Physical security - Industry Summary & Critical Success Factors (CSFs)
2. Global physical security market 2012 - 2020 (USD Million)
3. Global physical security market by region 2012 - 2020 (USD Million)
4. Global physical security market by component 2012 - 2020 (USD Million)
5. Global physical security market by application 2012 - 2020 (USD Million)
6. Global physical security hardware demand, 2012 - 2020 (USD Million)
7. Global physical security hardware demand, by region, 2012 - 2020 (USD Million)
8. Global physical security software demand, 2012 - 2020 (USD Million)
9. Global physical security software demand, by region, 2012 - 2020 (USD Million)
10. Global physical security services demand, 2012 - 2020 (USD Million)
11. Global physical security services demand, by region, 2012 - 2020 (USD Million)
12. Global physical security demand in transportation, 2012 - 2020 (USD Million)
13. Global physical security demand in transportation, by region, 2012 - 2020 (USD Million)
14. Global physical security demand in government sector, 2012 - 2020 (USD Million)
15. Global physical security demand in government sector, by region, 2012 - 2020 (USD Million)
16. Global physical security demand in corporate, 2012 - 2020 (USD Million)
17. Global physical security demand in corporate, by region, 2012 - 2020 (USD Million)
18. Global physical security demand in hospitality 2012 - 2020 (USD Million)
19. Global physical security demand in hospitality, by region, 2012 - 2020 (USD Million)
20. Global physical security demand in energy 2012 - 2020 (USD Million)
21. Global physical security demand in energy, by region, 2012 - 2020 (USD Million)
22. Global physical security demand in retail 2012 - 2020 (USD Million)
23. Global physical security demand in retail, by region, 2012 - 2020 (USD Million)
24. Global physical security demand in industrial 2012 - 2020 (USD Million)
25. Global physical security demand in industrial, by region, 2012 - 2020 (USD Million)
26. Global physical security demand in control centers 2012 - 2020 (USD Million)
27. Global physical security demand in control centers, by region, 2012 - 2020 (USD Million)
28. Global physical security demand in chemical facilities 2012 - 2020 (USD Million)
29. Global physical security demand in chemical facilities, by region, 2012 - 2020 (USD Million)
30. Global physical security demand in other applications 2012 - 2020 (USD Million)
31. Global physical security demand in other applications, by region, 2012 - 2020 (USD

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Million)
32. North America physical security market by component 2012 - 2020 (USD Million)
33. North America physical security market by application 2012 - 2020 (USD Million)
34. Europe physical security market by component 2012 - 2020 (USD Million)
35. Europe physical security market by application 2012 - 2020 (USD Million)
36. Asia Pacific physical security market by component 2012 - 2020 (USD Million)
37. Asia Pacific physical security market by application 2012 - 2020 (USD Million)
38. RoW physical security market by component 2012 - 2020 (USD Million)
39. RoW physical security market by application 2012 - 2020 (USD Million)

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List Of Figures

LIST OF FIGURES

1. Physical Security Market Segmentation
2. Global physical security market 2012 - 2020 (USD Million)
3. Physical security value chain analysis
4. Physical security market dynamics
5. Key Opportunities Prioritized
6. Industry Analysis - Porter's
7. Physical security - Company market share analysis, 2013
8. Physical security PESTEL Analysis, 2013
9. Physical security market share by component, 2013 & 2020
10. Global physical security hardware demand, 2012 - 2020 (USD Million)
11. Global physical security software demand, 2012 - 2020 (USD Million)
12. Global physical security services demand, 2012 - 2020 (USD Million)
13. Physical security market share by application, 2013 & 2020
14. Global physical security demand in transportation, 2012 - 2020 (USD Million)
15. Global physical security demand in government sector, 2012 - 2020 (USD Million)
16. Global physical security demand in corporate, 2012 - 2020 (USD Million)
17. Global physical security demand in hospitality 2012 - 2020 (USD Million)
18. Global physical security demand in energy 2012 - 2020 (USD Million)
19. Global physical security demand in retail 2012 - 2020 (USD Million)
20. Global physical security demand in industrial 2012 - 2020 (USD Million)
21. Global physical security demand in control centers 2012 - 2020 (USD Million)
22. Global physical security demand in chemical facilities 2012 - 2020 (USD Million)
23. Global physical security demand in other applications 2012 - 2020 (USD Million)
24. Physical security market share by region, 2013 & 2020
25. North America physical security market by component 2012 - 2020 (USD Million)
26. North America physical security market by application 2012 - 2020 (USD Million)
27. Europe physical security market by component 2012 - 2020 (USD Million)
28. Europe physical security market by application 2012 - 2020 (USD Million)
29. Asia Pacific physical security market by component 2012 - 2020 (USD Million)
30. Asia Pacific physical security market by application 2012 - 2020 (USD Million)
31. RoW physical security market by component 2012 - 2020 (USD Million)
32. RoW physical security market by application 2012 - 2020 (USD Million)

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