

China Video Surveillance Industry Report, 2012

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Abstracts

The construction and development of projects like safe city, traffic informatization, financial monitoring, production safety, smart home and so forth have greatly boosted the demand for video surveillance products in China. The total market size of Chinese video surveillance industry hit RMB67 billion in 2011, up 19.71% year-over-year, and is expected to sustain a growth rate of 21.52% on average in 2012-2015.

The development of Chinese video surveillance industry has gone through three stages: analog video surveillance, digital video surveillance and network video surveillance. Presently, Chinese video surveillance market is experiencing a transition from analog to digital video surveillance, with the latter being the mainstream. During 2004-2012, digital video surveillance saw a rising proportion from 35.7% to 56.7% in the overall video surveillance market. Meanwhile, the network video surveillance market showed steady growth, and its share soared from 7.4% in 2004 to 28.2% in 2012.

Hikvision, the largest manufacturer of video surveillance equipment in China, principally provides video cameras, optical transceiver, DVR and network storage, etc., of which DVR serves as its leading product and contributes over 60% to the company's revenue. In July 2012, Hikvision introduced a new generation of vehicle-mounted DVR--DS-8100HMF-T which finds application in transporting equipments such as buses, coaches, special vehicles and subways. Meantime, Hikvision newly added multiple products in video camera field and launched new dome camera, day/night integrated camera and HD-SDI digital video camera, etc. in August 2012.

Dahua Technology is China's second largest video surveillance equipment producer and mainly supplies video cameras, DVR, monitors and otherwise. In July 2012, Dahua Technology and the U.S.-based Altera established FPGA Joint Laboratory to conduct cooperation in technical areas such as security monitoring and video processing. In August 2012, Dahua Technology released vehicle-mounted DVR to compete with

Hikvision.

This report resolves around the followings:

The development course, market size, market structure and development trend of Chinese security industry;

The market size and structure of Chinese video surveillance market;

The regional characteristics, average profit level and main brands of Chinese video surveillance industry;

The market demand, manufacturers' market share and regional distribution of video camera, DVR, optical transceiver and matrix;

The supply of upstream raw materials such as chips, optical lens and light sensors, and the demand from downstream sectors like traffic and safe city construction;

Key video surveillance equipment manufacturers in China and beyond, involving product type, business operation and product development, etc.

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