

Physical Security Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Systems Type (Physical Access System, Video Surveillance System, Perimeter Intrusion and Detection, Physical Security Information Management, Others), By Service Type (Access Control as a Service, Video Surveillance as a Service, Remote Monitoring Services, Security Systems Integration Services, Others), By Enterprise Size (Large Enterprises, SMEs), By Industry Vertical (BFSI, Government, Retail, Transportation, Residential, IT and Telecom, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Physical Security Market is projected to expand from USD 130.86 Billion in 2025 to USD 183.85 Billion by 2031, registering a CAGR of 5.83%. This sector encompasses a range of integrated systems and operational protocols, including video surveillance, access control, and perimeter reinforcement, designed to defend assets, facilities, and personnel against physical intrusions or unauthorized entry. Key factors fueling this growth include the necessity to secure critical infrastructure, the ongoing expansion of urban areas necessitating sophisticated monitoring, and strict regulatory requirements for workplace safety. As evidence of this strong demand, the Security Industry Association reported that in 2025, 76% of industry executives rated current business conditions as either good or excellent.

Despite this positive outlook, the market faces a substantial obstacle in the form of a severe scarcity of skilled technical workers needed to implement increasingly intricate, network-enabled security systems. This talent deficit constrains the ability of service providers to effectively handle large-scale projects and consequently increases implementation costs for customers. Ultimately, the inability to expand the workforce at a rate matching technological advancements threatens to hinder broader market expansion and slow the uptake of modern security infrastructures.

Market Driver

The incorporation of artificial intelligence and machine learning is revolutionizing the Global Physical Security Market by converting systems from simple recording devices into tools for proactive threat mitigation. Contemporary surveillance frameworks leverage these innovations to automate the detection of anomalies, recognize behavioral patterns, and significantly decrease false alarm rates, thereby boosting operational efficacy. This evolution is spurring substantial activity among manufacturers who are prioritizing intelligence features to satisfy changing customer needs; the Security Industry Association's '2025 Security Megatrends' report from December 2024 notes that 91% of security developers described their R&D investments as being fully or significantly oriented toward AI.

At the same time, the widespread adoption of cloud-based security offerings, such as Video Surveillance as a Service (VSaaS) and Access Control as a Service (ACaaS), is offering the scalability and remote management power needed to modernize infrastructure. Enterprises are increasingly favoring hybrid architectures that combine the stability of on-premises hardware with cloud flexibility, facilitating centralized management and cost-efficient growth. According to Genetec's 'State of Physical Security 2025' report from December 2024, 43% of end users plan to utilize hybrid models within five years, signaling a shift away from legacy systems. This transition also fosters closer departmental cooperation, with Genetec noting that 77% of end users reported collaboration between their physical security and IT teams.

Market Challenge

A critical shortage of qualified technical labor creates a major bottleneck that limits the revenue potential and scalability of the Global Physical Security Market. As security systems evolve from standalone devices to sophisticated, network-integrated ecosystems, the skills required for installation and maintenance have changed

significantly. Service providers struggle to fulfill large-scale deployments due to a lack of personnel possessing the necessary dual expertise in IT networking and physical hardware. This scarcity results in substantial project backlogs, compelling end-users to postpone essential upgrades and preventing the market from fully satisfying the current demand for advanced security solutions.

Additionally, this skills gap fosters an inflationary environment that suppresses wider market adoption. To attract the limited pool of technical talent, integration firms must offer higher wages, costs that are ultimately passed down to the client, thereby raising the total cost of ownership for security initiatives. The Foundation for Advancing Security Talent reported in 2024 that 70% of system integrators cited technician positions as the most challenging to fill, underscoring the gravity of this workforce issue. Consequently, the inability to match workforce capacity with technological progress limits industry growth, as the financial capital available for projects exceeds the technical capacity to execute them.

Market Trends

The shift toward mobile access control and digital credentials is steadily displacing traditional physical badges, fueled by the widespread use of smartphones and the need for enhanced security assurance. Organizations are utilizing Near Field Communication and Bluetooth Low Energy protocols to issue credentials remotely, removing the logistical challenges of printing cards and reducing risks related to stolen or lost badges. This movement signifies a fundamental transition toward touchless, interoperable environments that integrate smoothly with broader enterprise identity platforms. As per HID Global's '2024 State of the Security Industry Report' from March 2024, nearly 80% of end-user organizations anticipate deploying mobile IDs within the next five years, highlighting a major pivot toward dematerialized access methods.

Concurrently, the market is experiencing a marked emphasis on energy-efficient and sustainable security solutions, driven by corporate Environmental, Social, and Governance (ESG) requirements. Manufacturers are redesigning hardware to lower power usage and utilizing recycled materials, while end-users are increasingly selecting vendors that help reduce the carbon footprint linked to massive data storage and surveillance operations. This alignment forces the industry to innovate beyond mere performance, making environmental impact a key value proposition in hardware procurement. Honeywell's '2024 Impact Report' from October 2024 reveals that over 60% of their new product R&D investment focused on sustainability, reflecting the supply side's commitment to environmentally responsible technology.

Key Market Players

Johnson Controls International plc

Honeywell International Inc.

Bosch Security Systems

Assa Abloy AB

Tyco International plc

Canon Inc.

Hikvision Digital Technology Co., Ltd.

Dahua Technology Co., Ltd.

Axis Communications AB

FLIR Systems, Inc.

Report Scope

In this report, the Global Physical Security Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Physical Security Market, By Systems Type

Physical Access System

Video Surveillance System

Perimeter Intrusion and Detection

Physical Security Information Management

Others

Physical Security Market, By Service Type

Access Control as a Service

Video Surveillance as a Service

Remote Monitoring Services

Security Systems Integration Services

Others

Physical Security Market, By Enterprise Size

Large Enterprises

SMEs

Physical Security Market, By Industry Vertical

BFSI

Government

Retail

Transportation

Residential

IT and Telecom

Others

Physical Security Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Physical Security Market.

Available Customizations:

Global Physical Security Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL PHYSICAL SECURITY MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Systems Type (Physical Access System, Video Surveillance System, Perimeter Intrusion and Detection, Physical Security Information Management, Others)
 - 5.2.2. By Service Type (Access Control as a Service, Video Surveillance as a Service, Remote Monitoring Services, Security Systems Integration Services, Others)

- 5.2.3. By Enterprise Size (Large Enterprises, SMEs)
- 5.2.4. By Industry Vertical (BFSI, Government, Retail, Transportation, Residential, IT and Telecom, Others)
- 5.2.5. By Region
- 5.2.6. By Company (2025)
- 5.3. Market Map

6. NORTH AMERICA PHYSICAL SECURITY MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Systems Type
 - 6.2.2. By Service Type
 - 6.2.3. By Enterprise Size
 - 6.2.4. By Industry Vertical
 - 6.2.5. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Physical Security Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Systems Type
 - 6.3.1.2.2. By Service Type
 - 6.3.1.2.3. By Enterprise Size
 - 6.3.1.2.4. By Industry Vertical
 - 6.3.2. Canada Physical Security Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Systems Type
 - 6.3.2.2.2. By Service Type
 - 6.3.2.2.3. By Enterprise Size
 - 6.3.2.2.4. By Industry Vertical
 - 6.3.3. Mexico Physical Security Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Systems Type

- 6.3.3.2.2. By Service Type
- 6.3.3.2.3. By Enterprise Size
- 6.3.3.2.4. By Industry Vertical

7. EUROPE PHYSICAL SECURITY MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Systems Type
 - 7.2.2. By Service Type
 - 7.2.3. By Enterprise Size
 - 7.2.4. By Industry Vertical
 - 7.2.5. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Physical Security Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Systems Type
 - 7.3.1.2.2. By Service Type
 - 7.3.1.2.3. By Enterprise Size
 - 7.3.1.2.4. By Industry Vertical
 - 7.3.2. France Physical Security Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Systems Type
 - 7.3.2.2.2. By Service Type
 - 7.3.2.2.3. By Enterprise Size
 - 7.3.2.2.4. By Industry Vertical
 - 7.3.3. United Kingdom Physical Security Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Systems Type
 - 7.3.3.2.2. By Service Type
 - 7.3.3.2.3. By Enterprise Size
 - 7.3.3.2.4. By Industry Vertical

7.3.4. Italy Physical Security Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Systems Type

7.3.4.2.2. By Service Type

7.3.4.2.3. By Enterprise Size

7.3.4.2.4. By Industry Vertical

7.3.5. Spain Physical Security Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Systems Type

7.3.5.2.2. By Service Type

7.3.5.2.3. By Enterprise Size

7.3.5.2.4. By Industry Vertical

8. ASIA PACIFIC PHYSICAL SECURITY MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Systems Type

8.2.2. By Service Type

8.2.3. By Enterprise Size

8.2.4. By Industry Vertical

8.2.5. By Country

8.3. Asia Pacific: Country Analysis

8.3.1. China Physical Security Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Systems Type

8.3.1.2.2. By Service Type

8.3.1.2.3. By Enterprise Size

8.3.1.2.4. By Industry Vertical

8.3.2. India Physical Security Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

- 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Systems Type
 - 8.3.2.2.2. By Service Type
 - 8.3.2.2.3. By Enterprise Size
 - 8.3.2.2.4. By Industry Vertical
- 8.3.3. Japan Physical Security Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Systems Type
 - 8.3.3.2.2. By Service Type
 - 8.3.3.2.3. By Enterprise Size
 - 8.3.3.2.4. By Industry Vertical
- 8.3.4. South Korea Physical Security Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Systems Type
 - 8.3.4.2.2. By Service Type
 - 8.3.4.2.3. By Enterprise Size
 - 8.3.4.2.4. By Industry Vertical
- 8.3.5. Australia Physical Security Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Systems Type
 - 8.3.5.2.2. By Service Type
 - 8.3.5.2.3. By Enterprise Size
 - 8.3.5.2.4. By Industry Vertical

9. MIDDLE EAST & AFRICA PHYSICAL SECURITY MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Systems Type
 - 9.2.2. By Service Type
 - 9.2.3. By Enterprise Size
 - 9.2.4. By Industry Vertical

- 9.2.5. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Physical Security Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Systems Type
 - 9.3.1.2.2. By Service Type
 - 9.3.1.2.3. By Enterprise Size
 - 9.3.1.2.4. By Industry Vertical
 - 9.3.2. UAE Physical Security Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Systems Type
 - 9.3.2.2.2. By Service Type
 - 9.3.2.2.3. By Enterprise Size
 - 9.3.2.2.4. By Industry Vertical
 - 9.3.3. South Africa Physical Security Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Systems Type
 - 9.3.3.2.2. By Service Type
 - 9.3.3.2.3. By Enterprise Size
 - 9.3.3.2.4. By Industry Vertical

10. SOUTH AMERICA PHYSICAL SECURITY MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Systems Type
 - 10.2.2. By Service Type
 - 10.2.3. By Enterprise Size
 - 10.2.4. By Industry Vertical
 - 10.2.5. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Physical Security Market Outlook

- 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
- 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Systems Type
 - 10.3.1.2.2. By Service Type
 - 10.3.1.2.3. By Enterprise Size
 - 10.3.1.2.4. By Industry Vertical
- 10.3.2. Colombia Physical Security Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Systems Type
 - 10.3.2.2.2. By Service Type
 - 10.3.2.2.3. By Enterprise Size
 - 10.3.2.2.4. By Industry Vertical
- 10.3.3. Argentina Physical Security Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Systems Type
 - 10.3.3.2.2. By Service Type
 - 10.3.3.2.3. By Enterprise Size
 - 10.3.3.2.4. By Industry Vertical

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

13. GLOBAL PHYSICAL SECURITY MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

- 15.1. Johnson Controls International plc
 - 15.1.1. Business Overview
 - 15.1.2. Products & Services
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel
 - 15.1.5. SWOT Analysis
- 15.2. Honeywell International Inc.
- 15.3. Bosch Security Systems
- 15.4. Assa Abloy AB
- 15.5. Tyco International plc
- 15.6. Canon Inc.
- 15.7. Hikvision Digital Technology Co., Ltd.
- 15.8. Dahua Technology Co., Ltd.
- 15.9. Axis Communications AB
- 15.10. FLIR Systems, Inc.

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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