



Source: BSRIA Proplan

World Market for Total IBC(s) System Sales 2008

### This report will help you to:

- Identify market opportunities
- Understand market trends
- Keep up to date with market developments, the players and routes to market
- Develop sales, marketing and distribution strategies
- Stay ahead of the competition

### Introduction

This study is part of a series of multi-client reports on the world's market for intelligent controls in non-domestic buildings. Support from all the major manufacturers and suppliers over the last 25 years has enabled us to develop a series of robust models that when populated with validated data can determine the performance and value of both the supply and demand side. It has allowed us to size, compare and trend numerous market segmentations, establish supplier performance in both product and systems business and establish the importance and effect of all the demand drivers. "Security Systems - IBC(s) - The European Market 2008 to 2013" is the most detailed and accurate report published on this subject for this region. This report of 2300 pages benefits from comparisons with our similar studies carried out in different regions of the world and related technical infrastructures in buildings. Split into three studies, it separately assesses the markets for Access Control - IBC(a), CCTV/Video Surveillance - IBC(c), and Intruder Alarms - IBC(i). Countries covered in the study include *France, Germany, Italy, the Netherlands, Spain* and *UK*.

Each study is split into two volumes; volume I comprising the executive summary which compares findings across all countries; and volume II providing the detailed analysis using the same format for each country. Data on the past present and future market for IBC(e) is clearly presented in both quantitative and qualitative terms, so that strategies can be developed to fully exploit opportunities on a pan-European basis.

### Study Overview

BSRIA's report shows that the EU(6) Security Systems - IBC(s) industry managed a small compound growth of 3.6% in the last two years. Nevertheless, it is an improvement on the performance compared with the growth of 3.2% per annum achieved in the period between 2001 and 2006. In the last two years the Access Controls market has experienced a growth of 4.0% per annum, representing a slowdown of 2% from the period between 2001 and 2006. The star performer has been the CCTV Video Surveillance sector, which has achieved growth of 7.5% per annum from 2006. The Intruder Alarms market experienced a decline of 1.0% per annum from 2006 to 2008. In global terms, the EU(6) accounts for approximately 27% of the total world sales.

In the EU(6), the UK is the largest and most mature market followed by Germany, France, Italy, Spain and finally the Netherlands. The UK has a penetration level around twice that of France or Germany

Compared to the period 2001-2006, a slow down in the growth of the access control market is evident. The access control market is more construction driven than some other security markets and in several countries, in particular the UK, Italy and Spain there has been a marked turndown in construction investment.

The CCTV/Video Surveillance market by comparison has continued to perform strongly, driven by the ongoing transition to digital systems, IP and networked solutions.

Across the EU(6), the intruder alarm market is either stagnating or in decline. The reason behind this is because customers are choosing CCTV and access control solutions over intruder alarm systems as they provide many more benefits. However, the intruder alarm market still represents a large and important base for the security monitoring business.

One driver for installing IBC(s) is the perception of the level of crime and the need to combat it with the most cost effective automated systems. Although crime rates overall have been dropping, organised crime prevention in many sectors remains still one of the most important challenges for IBC(s) suppliers. The supply structure across Western Europe is strong, with all the international companies present and well-developed third party distribution channels are in place. However, it remains a very fragmented market and in the current economic climate it will be survival of the fittest, with further mergers and acquisitions to be expected.

### BSRIA Worldwide Market Intelligence

BSRIA Proplan is a specialist consultancy that focuses on analysing the market for intelligent controls in buildings. Our studies are built upon their valuable data which major suppliers have entrusted to us, as well as information gathered in face-to-face interviews with end users and other players in the supply chain. Our integrity and honesty have given us this privileged and unique position - to deliver insightful analysis based on accurate quantitative data.

- The sales by Product (factory gate prices) and Systems (installed) for direct and indirect channels, to 2008, with forecast to 2013
- The level of penetration of system sales in each country and how this compares with other developing and developed markets
- The market size by type of project, new - construction, refurbishment and retrofit
- The market size by contract value (4 segments)
- The market size by single, multiple & multi-site projects
- The market size by type of hardware (8 products)
- The market size by type/end use of building (16 categories)
- The distribution channels and the volume of business that they handle, comparing “product” and “total solution sales”
- Market share bands for all established suppliers by IBC(a), IBC(c) and IBC(i) product and by total systems sales
- Profiles of established suppliers provided in a standard format allowing comparisons to be made
- Establishes the part played by all third party suppliers and the impact that they will have in the future
- A detailed analysis of the channels of distribution and emerging trends
- Assess the IBC(e) suppliers’ influence on Total Building Solutions and measures the incidence of integrated services by both functionality and the vertical building markets in which they are installed
- Reviews the impact of Technology and IT-Convergence on IBC(s) business

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