

Press Article

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Will It Be Another Roller Coaster Ride For The Security and Fire Systems Market?

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The latest report on Intelligent Controls in Buildings – Monitoring service of Security and Fire Systems (2008-2013) is now available. Countries covered in the study include France, Germany, Italy, the Netherlands, Spain and UK.

BSRIA's report shows that the EU(6) Monitoring Service – IBC(m) market managed a modest compound growth of 1.6% between 2006 and 2008, which represents a slowdown compared to previous years. Over the forecast period the IBC(m) sales will be impacted by the current economic downturn and the slowdown in the construction sector.

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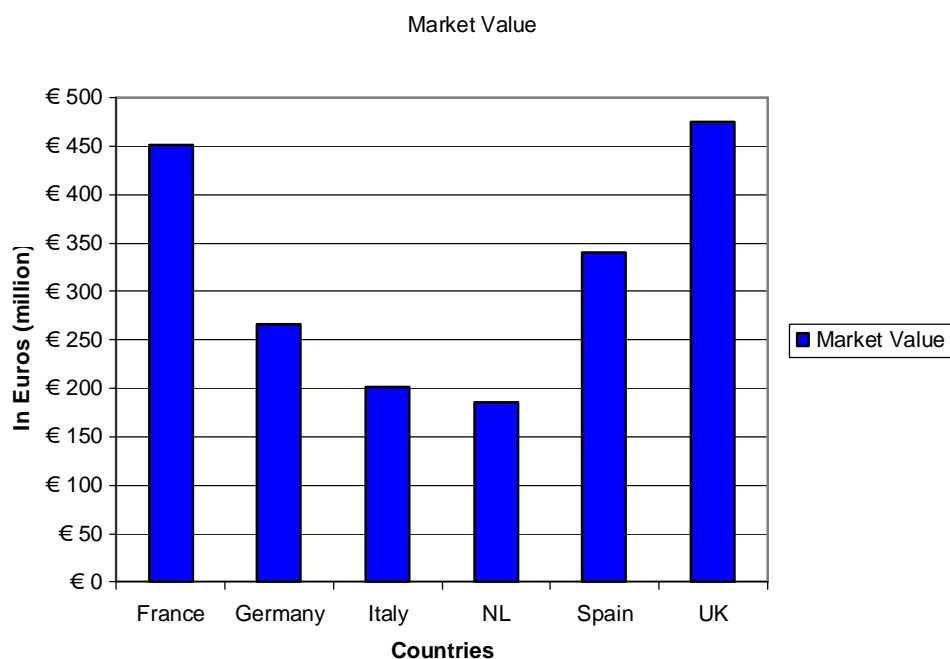
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In 2008 there were around 5.6 million security and fire connections to Central Monitoring Stations (CMS) in the EU(6). It is a common characteristic of all the analysed countries that the monitoring of intruder alarm systems represents by far the most extended type of monitoring service. Nonetheless, the monitoring of CCTV and Fire Alarm systems are in an upward trend.

In the EU(6) the UK is the largest and most mature market at 24.7% followed by Spain, France, Germany, Italy and the Netherlands. Although overall crime rates have been dropping, the threat of intrusion and the wish to protect assets has been one of the main demand drivers. Technology progress has been another significant factor. In terms of signal transmission an ongoing transition from PSTN towards IP and GSM has been identified.

The supply structure across Western Europe is strong, with a few of international companies and numerous national companies operating in the industry. The monitoring service market remains very fragmented and in the current economic climate it will be survival of the fittest.



United Kingdom

'Banking, Finance and Insurance' by far have the largest market share in security in all the countries apart from the UK where 'Offices' have a larger share at 15%. It is fair to say that the UK market is fairly stable; in 2009 the market grew however there was a decline in growth of 1.5% from previous years. The market is predicted to continue growing in this gradual pattern as before.

France

The French market was thriving since 2004. There was a sharp increase in market share until it reached its peak in 2007 and saw its first fall in years in the year 2008. Unfortunately the market is predicted to continue falling by a total of 4.8% until 2011 when it will pick up again and by 2013 it will head back to the promising stage it was at in 2006.

Spain

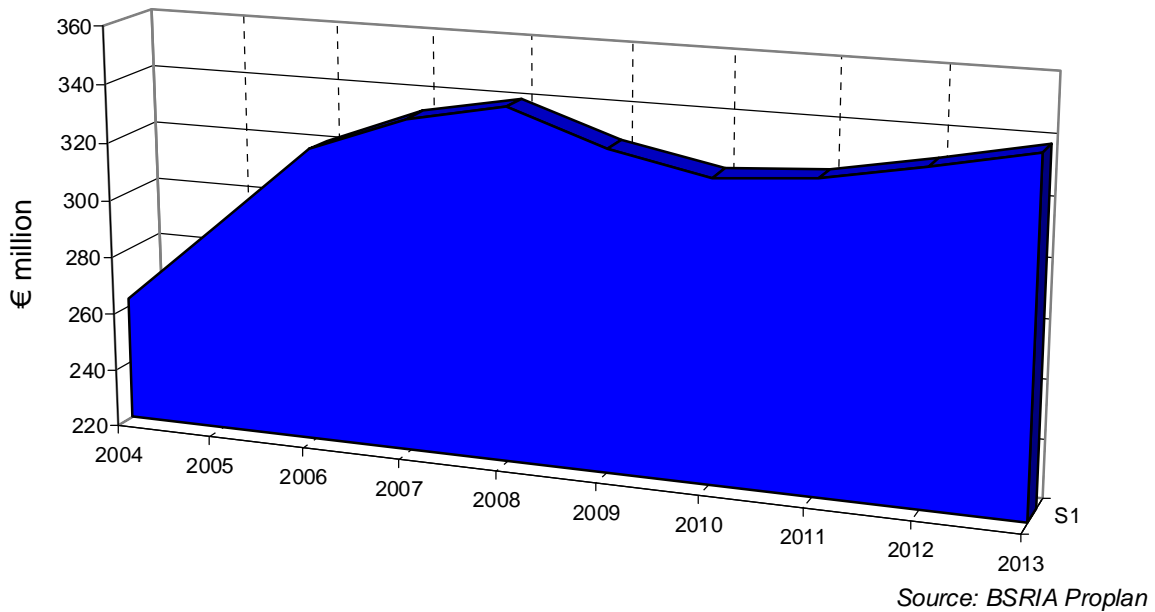
Spain had a booming market and has seen a 10% growth on average every year since 2004 until it slowed down in 2007. The market growth between 2004-2008 was 29.5%. 2009 saw a decline in sales and the market is not expected to pick up until 2010 onwards when it will start to see a slow and gradual growth.

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Germany

The German market had experienced a slow but steady growth in recent years which peaked at 2008, but had a sharp fall of 3.8% in 2009 however after 2010 it is forecast that the market will begin to pick up quite rapidly and between 2009-2013 it would have grown by 10%.

Netherlands

The Netherlands Market has seen a healthy growth of 8.4% in the market between 2004 and 2008. This year has seen the market halt and it is not forecast to grow until 2011 when there will be 0.5% increase with steady growth until 2013.

Italy



The Italian market is not that lucrative in comparison to others. Since 2006 the market has been growing very slowly and in 2009 and 2010 the markets are expected to remain the same with no significant growth or decline. Fortunately from 2010 onwards there will be a growth of 0.5% each year.

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BSRIA's study provides a powerful and unbiased assessment tool of the future potential for Security and Fire Systems in the European region. The research done is presented individual country sections on all major markets, including product segmentation, an application, distribution, and analysis of market drivers and barriers in each country as well as forecasts with scenarios and forecast assumptions.

Note to editors:

BSRIA Proplan's Intelligent Building Controls study will be published in Winter 2009. They cover a total of 6 European countries for security and fire systems. Each report contains information on market size and segmentation, market trends, a strategic analysis, sales by application and distribution channel. Also, there is an overview report available which comes in an excel format which provides a useful tool to filter and sort data according to their needs and interests.

The reports are largely based on in-depth interviews with key manufacturers, distributors, utilities, and other influencers in the market.

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