

[>> Download this market research report on Reportlinker.com](#)

UK Access Control

Published on April 2007

Report Summary

In 2006, Key Note estimates that the UK access-control market was worth £290m at current end-user prices, including the cost of installation, with growth of 7.4% in current value terms from 2005.

The access-control market, as defined in this Key Note Market Report, is concerned with physical access control. Therefore, the report discusses access control for a site, building or area, as opposed to access control for data or computer networks. The products that can be described as physical access control include: audio and video entryphones; keypad entry systems; card- and token-based access-control systems, which cover Wiegand cards, magnetic-stripe cards, barcode cards, proximity systems, long-range/hands-free systems, systems to control vehicle access, smart-cards and dual-function cards; and biometric systems. Some systems incorporate more than one of these technologies for added security.

The main factors driving the access-control market are investment in new buildings and refurbishment of existing premises, and the need to protect vulnerable locations against the threat of terrorism. In 2006, construction output in the private commercial sector ' which includes sites such as offices, shops, warehouses, banking and finance, and private leisure ventures ' showed growth, even with its previously high level of output. Annual housing construction output increased by a total of nearly 37% in 4 years between 2002 and 2006. The threat from terrorism does not appear to have abated in 2006, and still provides a strong impetus to security markets.

The rising popularity of proximity systems, since 2000, has been encouraged by falling prices of proximity hardware. In 2005 and 2006, the continued success of proximity technology was helped by its accessibility for some disabled people (this is much easier than using cards that have to be fitted into reading machines). However, the sector appears to have reached its peak, and there is growing competition from hands-free systems and contactless smart cards.

The sector for smart-card systems is showing growth, while biometrics remains a relatively small sector, with potential for substantial growth in the future.

The trend towards integration of security systems with building-management and fire-protection systems continues. Access-control companies are offering products based on open architecture, which can be controlled over local-area networks (LANs), or over the Internet, and which can be integrated with systems from other manufacturers. The possibility of transmitting security data over the Internet has, in turn, led to a demand for enhanced security in the form of data encryption.

Key Note forecasts that the access-control market will grow in excess of 7% per year, in current price terms, between 2007 and 2011. Growth is likely to be steepest for smart-card technology, although proximity and hands-free technologies will continue to take a large proportion of the market. Looking further into the future, there is huge potential for the adoption of biometric technology and for the greater use of access control by the residential sector.

Table of Content

Executive Summary

1. Market Definition

REPORT COVERAGE

market SECTORS

Audio and Video Entryphones

Keypad Entry Systems

Card- and Token-Based Access-Control Systems

Wiegand Cards

Magnetic-Stripe Cards

Barcode Cards

Proximity Systems

Long-Range/Hands-Free Systems

Systems to Control Vehicle Access

Smart Cards

Dual-Function Cards

Biometric Systems

MARKET TRENDS

Business Investment

Construction Output

Integrated Systems

The Terrorist Threat

Effect of the Disability Discrimination Act

Prices

ECONOMIC TRENDS

Population

Gross Domestic Product

Inflation

Unemployment

Household Disposable Income

MARKET POSITION

The UK

Overseas

2. Market Size

THE TOTAL MARKET

by market sector

Audio and Video Entryphones

Keypad Entry Systems

Card- and Token-Based Access-Control Systems

Magnetic-Stripe Cards

Barcode Cards

Proximity Systems

Long-Range/Hands-Free Systems

Smart Cards

Biometric Systems

OVERSEAS TRADE

Imports

Exports

3. Industry Background

Recent History

Number of Companies

Employment

REGIONAL VARIATIONS IN THE MARKETPLACE

DISTRIBUTION

HOW ROBUST IS THE MARKET'

LEGISLATION

Standards

Publications of the British Security Industry Association

Electromagnetic Compatibility Directive

The Disability Discrimination Act

The RoHS Directive

The WEEE Directive

key TRADE ASSOCIATIONS

The Association of Police and Public Security Suppliers

British Security Industry Association

Electrical Contractors' Association

International Association for Biometrics

National Security Inspectorate

Security Systems and Alarms Inspection Board

4. Competitor Analysis

THE MARKETPLACE

MArket leaders

Assa Abloy AB

Bewator Ltd

BPT Entry Control Solutions

CEM Systems

Group 4 Technology Ltd

Kaba (UK) Ltd

Newmark Security PLC

Stanley Security Solutions ' Europe Ltd

Other Companies

SYSTEM DESIGNERS/INSTALLERS

ADT Fire and Security PLC

Bell Security Ltd

Chubb Electronic Security Ltd

Initial Electronic Security Systems Ltd

ELECTRONIC SECURITY WHOLESale DIStributors

ADI-Gardiner Ltd

Norbain SD Ltd

OUTSIDE SUPPLIERS

Lock Hardware

Barriers

Smart Cards

marketing activity

Exhibitions

Airport, Port and Transport Security Exhibition

ASIS

Biometrics2007

British Security Industry Association

Ifsec
IIPSEC
Security Essen

5. Strengths, Weaknesses, Opportunities and Threats

THE TOTAL MARKET

Strengths

Weaknesses

Opportunities

Threats

AUDIO AND VIDEO ENTRYphones

Strengths

Weaknesses

Opportunities

Threats

KEYPAD entry SYSTEMS

Strengths

Weaknesses

Opportunities

Threats

card- and token-based access-control systems

Traditional Card-Reader Systems

Strengths

Weaknesses

Opportunities

Threats

Proximity or Token Systems

Strengths

Weaknesses

Opportunities

Threats

Hands-Free/Long-Range Systems

Strengths

Weaknesses

Opportunities

Threats

Contactless Smart Cards

Strengths

Weaknesses

Opportunities

Threats

BIOMETRIC SYSTEMS

Strengths

Weaknesses

Opportunities

Threats

6. Buying Behaviour

Introduction

INDUSTRY

Robert Bosch

Total Lindsey Oil Refineries

RETAILING

ASDA

HOTELS

European Inn

EDUCATION

University of Stirling

Guildhall School of Music and Drama

HEALTH

James Cook University Hospital

AIRPORTS

Manchester Airport

British Airways

RESIDENTIAL

7. Current Issues

CRIME LEVELs

NEW PRODUCT LAUNCHES

Tailgate Detection

Watch-Strap Token

Biometrics for the Home

G4 SECURITY SERVICES EXPANDS ITS access-control PRESENCE

CHOICE OF BIOMETRIC TECHNOLOGIES

8. The Global Market

THE WORLD MARKET

NORTH AMERICA

EUROPE

ASIA

THE MIDDLE EAST

9. Forecasts

INTRODUCTION

The Economy

Population

Gross Domestic Product

Inflation

Unemployment

Building Output

Interest Rates

FORECASTS 2007 to 2011

Market Growth

FUTURE TRENDS

10. Company Profiles

Adt Fire And Security Plc

Assa Abloy Ltd

Bell Security LTD

Bewator Ltd

Chubb Electronic Security Ltd
Controlled Electronic Management Systems Ltd
Group 4 Technology Ltd
Hid Corporation Ltd
Kaba (uk) Ltd
Newmark Security Plc
Pac International Ltd
Stanley Security Solutions Ltd

11. Consumer Confidence

METHODOLOGY

KEY FINDINGS THIS QUARTER

THE WILLINGNESS TO BORROW

Confidence Improves

Willingness to Borrow Slips Slightly

SPENDING FROM SAVINGS

Slight Increase in Spending from Savings

Saving Grows in Relative Importance

12. Further Sources

Fax Order Form

To place an order via fax simply print this form, fill in the information below and fax the completed form to **(805) 617 17 93** . If you have any questions please visit <http://www.reportlinker.com/notify/contact>

Order Information

Please verify that the product information is correct and select the format(s) you require.

[UK Access Control](#)

Product Formats

Please select the product formats and the quantity you require.

Digital Copy -- USD 825.00 Quantity: _____

Hard Copy -- USD 825.00 Quantity: _____

Contact Information

Please enter all the information below in **BLOCK CAPITALS**

Title: Mr Mrs Dr Miss Ms Prof

First Name: _____ Last Name: _____

Email Address: _____

Job Title: _____

Organization: _____

Address: _____

City: _____

Postal / Zip Code: _____

Country: _____

Phone Number: _____

Fax Number: _____

Payment Information

Please indicate the payment method, you would like to use by selecting the appropriate box.

Payment by credit card Card Number: _____

Expiry Date _____ / _____

CVV Number _____

Card Type (ex: Visa, Amex...) _____

Payment by wire transfer Crédit Mutuel

RIB : 10278 07314 00020257701 78

BIC : CMCIFR2A

IBAN : FR76 1027 8073 1400 0202 5770 178

Payment by check UBIQUICK SAS
16 rue Grenette – 69002 LYON, FRANCE

Customer signature:

Please note that by ordering from Reportlinker you are agreeing to our Terms and Conditions at

<http://www.reportlinker.com/index/terms>

Please fax this form to

(805) 617 17 93