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Access Control 2023

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Bryan is a senior analyst with Omdia's physical security group and is responsible for maintaining and updating the content of the Access Control Intelligence Service. Over the past five years, Bryan has emerged as a leading voice in identifying new trends and market developments impacting market demand for physical electronic access control equipment and services.

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"Supply chain disruptions, shortages of components such as steel and semiconductors, and the impacts of inflation led the average sales price of access control panels to increase over 10% between June 2021 and June 2022."
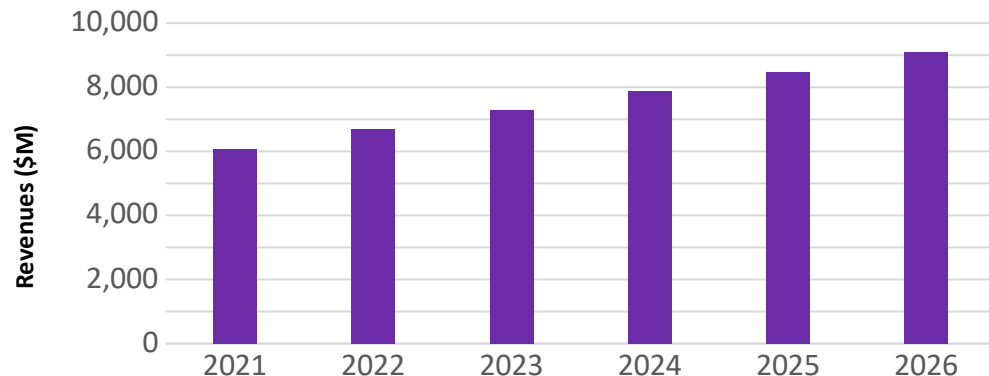
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How Omdia Helps You

- The most granular access control market analysis via continuous coverage of 40 equipment types across 18 end user industries and 34 countries / sub-regions

- Tracking of emerging access control trends and technological developments across four major regions in an annual report

- Identify macro and micro trends by based on a proven reported data-based methodology

- Dedicated analyst time to address your unique access control inquiries

World Market for Electronic Physical Access Control Equipment – 2021 to 2026

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Key Questions Addressed

- What are the key drivers and barriers for growth of access control equipment sales in different sub-regions and vertical markets?

- How have growth opportunities and market forecasts been impacted by the COVID-19 pandemic, supply chain disruptions, Russia's invasion of Ukraine and other global events?

- What role will privacy concerns and government regulations play in affecting sales opportunities for facial recognition biometric readers? Will the market trend away from biometric readers or physical credentials in the post-pandemic world?

- Is the market for mobile access solutions continuing to experience significant growth? What additional steps must vendors take to effectively monetize mobile credentials?

- What unique factors contribute to demand of integrated 'X-in-one' access control equipment in China?

- Who are the leading suppliers in each region and for each product type? Who has gained or lost market share?

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Deliverables

DATABASE

—Annual—

Forecasts and market share estimates, delivered in Excel

BRIEFS & REPORTS

—Annual—

Market briefs offer analysis of and insights from the dataset; reports provide analysis of key technology trends and industry conferences

ANALYST INSIGHTS

—Ongoing—

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.

ANALYST ACCESS

—Ongoing—

For prompt responses to urgent and unique questions.

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Recent and Planned Enhancements

Previous Enhancements

Temperature Checking Scanners

In response to evolving demands during the COVID-19 pandemic, the Access Control Intelligence Service expanded to include revenues and unit shipments of temperature checking scanners by region.

A fourth region: Mainland China and Hong Kong

In 2022, the Access Control Intelligence Service was expanded to include Mainland China and Hong as a distinct region from the rest of Asia and Oceania. This update incorporated 19 market size tables and 7 market share tables that captured Chinese demand for access control equipment, with new splits encompassing subtypes of readers, control panels, credentials, software and electronic locks. In addition, the 2022 update included 19 new market size tables that encapsulated demand in the Rest of Asia and Oceania, excluding China and Hong Kong.

Coverage of new market developments in 2022

Omdia's analysis of the dramatic reshaping of the access control market in the wake of the pandemic was expanded, including new insights associated with global supply chain disruptions and the impacts of inflation on the average sales prices of equipment.

2023 Planned Enhancements

- Continued improvements to the scope of Omdia's coverage of the access control market in Mainland China and Hong Kong

- New market size and market share segmentations for sales of mobile credentials

- New market size tables relating to market sizes and growth for Access Control as a Service (ACaaS) solutions, divided by management type and architecture type

- Two new vertical markets in Omdia's end user industry tables

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Market Sizing, Forecasts & Analysis

Insight report

This PDF provides detailed descriptions of the service scope, research taxonomy and definitions by product type and research segmentation. This document also provides commentary on the most important macro trends which affect the industry.

Accompanying the forecast database this PDF provides the analysis of the physical electronic access control market sizing and forecast database.

Analysis includes explanation of changes, detailed insight of product and regional trends picked out from the data.

Access Control IS Forecast Database

Delivered in Excel, this database provides comprehensive market size data and forecasts for the access control equipment market. Historical data is also provided back to 2021.

Frequency: Base year for most recent historical year and 5-year annual forecast
Historical data (2021-base year)

- Regional and global market forecasts
- 5 main product categories
- Revenues for 4 regions, further divided into 34 countries and sub-regions
- Revenues for 18 end user sectors
- Units, revenues and ASP data presented by region for each product type

Measures

- Revenues
- Unit shipments
- ASP

Regions Database structured by following regions:

World

Americas	EMEA	Mainland China	Asia and Oceania

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Market Sizing, Forecasts & Analysis

TOP LEVEL PRODUCTS

- Readers
- Control Panels
- Credentials
- Software
- Electronic Locks

READERS BY TYPE

- Magnetic Stripe
- Proximity Card (125 kHz)
- Smart Card (13.56 MHz)
- Bluetooth
- Biometric
- Multi-technology
- Mobile capable Reader

PANELS BY TYPE

- Edge
- Serial RS-485
- IP-enabled
- Standalone (Keypad)

CREDENTIALS BY TYPE

- Magnetic Stripe
- 125 kHz Proximity Card
- 13.56 MHz Smart Card
- Active Transponders
- Electronic Keys
- Mobile Credentials

SOFTWARE BY TYPE

- Locally hosted
- Cloud-based

ELECTRONIC LOCKS BY TYPE

- Electromechanical Lock
- Mechatronic Cylinder
- Digital Cylinder Locks
- Electromagnetic Locks
- Electric Strikes

BIOMETRIC READERS BY TYPE

- Fingerprint
- Facial Recognition
- Iris Recognition
- Finger Vein
- Hand Geometry

SMART CREDENTIALS BY TYPE

- LEGIC
- MIFARE Classic
- MIFARE Plus
- MIFARE DESFire
- iCLASS
- iCLASS SE / Seos

ELECTROMECHANICAL LOCKS BY TYPE

- Magnetic Stripe
- Proximity
- Smart Card
- Keypad
- Biometric

REVENUES BY END-USER SECTOR

- Banking & Finance
- Education
- Healthcare
- Residential
- Sports & Leisure
- Retail
- Utilities & Energy
- Airports
- Ports
- Other Transportation
- Government
- Industrial
- Hospitality
- Data Centers
- Private Offices
- Other Commercial
- Two additional end-user sectors (TBD)

Research coverage is subject to change as modifications are being planned to the scope of the 2024 edition

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Reports and Profiles

Physical Security Equipment & Services Report

This report uses top-level data from other Omdia research products which (otherwise fall outside the scope of this service) to provide a complete snapshot of the physical security market. It includes segmentation by security equipment type (video surveillance, access control, intrusion detection); service (systems integration, as-a-service models, remote monitoring revenues); end-user vertical; and geographic region. Also includes key company profiles.

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Reports and Profiles

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Service Area Package:
Physical Security Technologies

- Access Control – Annual Intelligence Service
- Intruder Alarms and Remote Monitoring – Annual Intelligence Service
- Video Surveillance & Analytics – Annual Intelligence Service

Transactional Reports

- Fire Detection and Suppression Equipment
- ANPR and Detection Sensors
- Audio and Video Door Phones
- Body Worn Cameras and Digital Evidence Management
- Mobile Video Surveillance
- Security Systems Integration
- Perimeter and Drones Security
- Enterprise and IP Storage used in Video Surveillance
- Explosives, Weapons and Contraband Detection Equipment
- Video Surveillance Installed Base
- Biometrics

About Omdia's Physical Security Technologies Research

Omdia is the world's leading provider of market intelligence to the security industry, with an impressive customer base that includes ten of the largest suppliers of electronic physical security products. We provide complete coverage of the electronic security market, with dedicated reports on a variety of markets including: video surveillance, security AI, physical security as a service, access controls, intruder alarms, fire detection, entrance control, drone detection and explosives, weapons & contraband detection equipment.

The level of detail is unmatched. Our reports can have as many as 200 data tables that analyze the market by product type, industry sector, country and sales channel. With analysts based in Europe, the US and Asia, we are also able to provide global coverage with local market insight.

Our range of products and services includes detailed annual market reports, quarterly market trackers and customer surveys. As well as the off-shelf studies, we also offer custom research and strategy consultancy services, and have successfully completed projects for some of the world's largest security firms.

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Our "Ask an Analyst" Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia's support team is here to help.

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:

Draw on our expertise

- Make the right decisions
- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies

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Customer Success Manager

Kâren Dyer
Customer Success Manager

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