Access Control Report - 2025

Part of the Physical Security Technology Service Area Coverage

Monitor and analyze important trends, gauge market shifts and make informed business decisions.

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"The growing trend of AI use cases in access control software has introduced opportunities to centralize and streamline virtual credentialing management, accelerating growth rates for both mobile access solutions and cloud-based architectures."

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Access Control Report - 2025

Who Is This Product For?

Strategy, Product, Marketing and Commercial teams working within...

- Access Control Equipment Vendors
- Access Control Software Providers
- Systems Integrators and Installers
- Physical Security Equipment Vendors
- Building Management System Providers
- Property Management Companies

How Does Omdia Help You?

- Identify and assess new market opportunities
- Define market needs and set customer-centric product roadmaps and go-to-market strategies
- Uncover product and industry specific competitive advantages
- Decide which technologies to invest in and who to partner with to achieve growth ambitions

Key Questions Answered?

- What drives and limits access control equipment sales across regions and markets?
- Will privacy regulations affect biometric reader adoption, and what credential types will dominate in the next decade?
- What's the status of mobile access growth, and how can vendors better monetize it?
- Why is integrated 'X-in-one' access control equipment particularly popular in China? How is this market expanding in Southeast Asia and Oceania?
- Who are the market leaders by region and product, and how have shares shifted?

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Access Control Report - 2025: Deliverables

Core Deliverables

Market Databases

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 & Access

Regular expert commentary and direct access to analysts for real-time responses to critical questions and tailored guidance.

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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.

- The research 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 2023.

Frequency: Base year for most recent historical year and 5-year annual forecast Historical data (2024-base year)

Measures
- Revenues
- Unit shipments
- ASP

- Regional and global market forecasts

- 5 main product categories

- Revenues for 4 regions, divided into 38 countries and sub-regions

- Revenues for 18 end user sectors

- Units, revenues and ASP data presented by region for each product type

Regional database structured by following regions:

World			
Americas	EMEA	Mainland China	Asia and Oceania

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New and enhanced content in 2025

Omdia is **refreshing** its **coverage of control panels**. Outdated segmentations, such as serial vs. IP-enabled panels, are being phased out. We are replacing them with **new framework** that highlights the differing growth between **traditional centralized controllers** housed in cabinets and **emerging "edge-like" controllers** installed at entryways.

New control panel segmentations

Omdia has revised its **ACaaS** definitions to better represent the state of the industry and is introducing a new distinction between 'pure cloud' and 'hybrid cloud' ACaaS revenue in market size tables.

New ACaaS segmentations and analysis

Colombia and the Philippines are being separated into distinct countries for top-level access control equipment and electronic locks revenue figures.

Two new subregions

- **A fourth region:** Mainland China and Hong Kong
- **Four new subregions** to better align the Access Control database
- **32 new market** size tables and **11 new market** share tables
- **New segmentations** of **mobile credential** revenues by region, new segmentations for both global and regional sales

Previous Enhancements

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Market sizing, forecasts & analysis

Detailed Coverage

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
- Centralized (IP-enabled)
- Edge-like (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 and Palm 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
- Single family residential
- Multifamily residential
- Sports & Leisure
- Retail
- Utilities & Energy
- Airports
- Ports
- Other Transportation
- Government
- Industrial
- Hospitality
- Data Centers
- Private Offices
- Other Commercial

Research coverage is subject to change as modifications are being planned to the scope of the 2025 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 and key company profiles.

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

Entrance Control for Pedestrians Report

This report offers an analysis of global demand for pedestrian entrance control equipment, such as turnstiles and speed gates, for highly trafficked facilities.

The report provides a thorough assessment of the pedestrian entrance control market by product type, subregion and end user industry and forecasts the impacts of significant trends through 2029.

The report provides detailed estimates of market revenues and shipments for the year 2024.

Estimates the market shares of leading suppliers by region and compares these estimates to Omdia's existing estimates of the leading suppliers from the previous edition of the report that published in 2022.

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