

## China Security & Protection Industry Report, 2009-2010

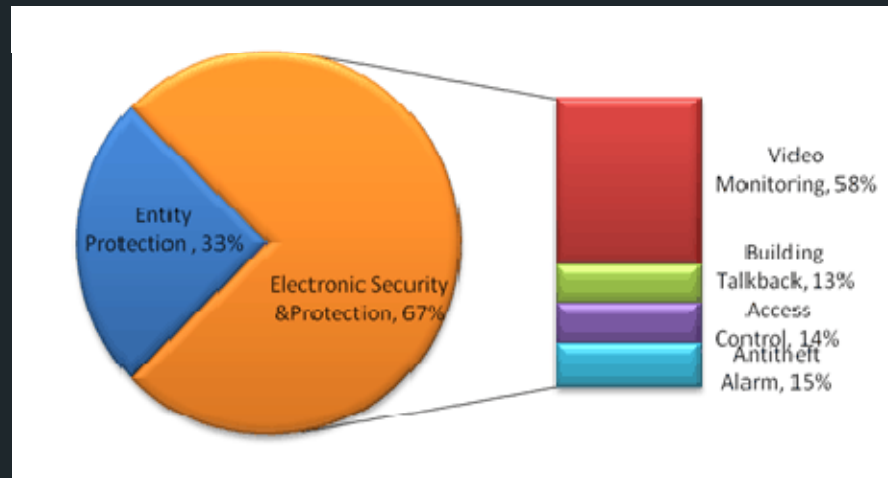


According to the statistics of China Security & Protection Industry Association (CSPIA), the market size of China's security & protection industry reached RMB136 billion in 2008 and RMB149.6 billion in 2009. The rapid development of China's security & protection industry in 2009 was primarily driven by the booming demand from such fields as safe city, road traffic, finance, education, army, etc.

In respect of regional development, China's security & protection industry basically falls into three big bases, i.e. Pearl River Delta, Yangtze River Delta, and Circum-Bohai-Sea Region. Of which, the security & protection industry strip centered by Pearl River Delta has become the processing-intensive region of high-tech security products with largest scale, highest development speed, as well as maximum product quantity & categories.

It is seen from product variety in the market of security equipment manufacturing that, the output value of entity protection products occupies 33% of the gross output value, while that of electronic security & protection products accounts for 67%, of which, the percentage of video monitoring products is 58%, that of building talkback products 13%, that of access control products 14%, and that of security alarm products 15%.

### Market Shares of Security & Protection Products



Source: ResearchInChina

This report gives priority to CCTV, DVR, access control system, and smoke detector.

#### **CCTV:**

The output of CCTV camera in China increased by 8% in 2009 with the manufacturers converged in South China which enjoys 78% of the market shares.

South China's Fujian Province is the manufacturing base of camera lens and possesses rich experience in production. A lot of lens makers such as Fuzhou Keekoon, Fuzhou Senview, etc. have brought CCTV cameras into production. Centered by Changzhou (Jiangsu Province), Hangzhou (Zhejiang Province) and Shanghai, East China region is with relatively strong capability of product R&D mainly in high-end products like high speed dome camera, IP camera and so forth. The manufacturers in North China are concentrated in Beijing and Tianjin, and they are involved in the development and production of high speed dome camera.

#### **DVR:**

The market gross of DVR in China in 2009 grew 19% from a year earlier, with the major manufacturers in Shenzhen-centered Guangdong region and Hangzhou-centered Jiangsu-Zhejiang-Shanghai area. The key manufacturers of DVR cover Hangzhou Hikvision Digital Technology Co., Ltd., Zhejiang Dahua Technology Co., Ltd., Zhejiang DALI Technology Co., Ltd., Suzhou KEDACOM, Shanghai Accella Technologies Limited, Shanghai Howell Electronics Co., Ltd., Shenzhen Tmvideo, Shenzhen Tungson Ages Tech Co., Ltd., Shenzhen Wave-particle Technology Co., Ltd., COSHIP Electronics Co., Ltd., Streaming Video Technology, etc. Of which, Dahua, Hikvision and DALI hold a total market share of over 70%.

#### **Access Control System:**

There were approximately 700 manufacturers of access control system (including parking lots, all-in-one cards, card readers, etc.) in China in 2009, and the market size was up by 20% from a year earlier. By region, China's production bases of access control products converge in Shenzhen, Beijing, Shanghai, Fujian, Jiangsu, etc., among which, Shenzhen and Beijing take a respective market share of 30.2% and 24.8%, followed by Shanghai with about 10.5% market shares.

### **Smoke Detector:**

In 2009, there were more than 110 manufacturers of fire detection and alarm products in China, and the annual output value of fire detection & alarm and fire fighting linkage control system products was more than RMB3.8 billion. Among all fire detectors installed every year in Chinese market, China-made brands approximate the proportion of 2/3 while the import brands seize about 1/3. Chinese manufacturers are centralized in Guangzhou, Shenzhen, etc.

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  - 3.2 TCL
  - 3.3 Shenzhen Victory Electric Co., Ltd.

- 3.4 Santachi Video Technology Co., Ltd.
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# How to Buy

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