

Essen, September 20, 2022

From September 20 to 23:

The Security Market in Germany:

Facts, Figures and Data

In 2020 and 2021 the German security market continued the expansion it has seen in recent years despite the pandemic. According to industry figures, in 2021 individual sectors increased their total turnover by 13.4% to 24.15 billion Euros over the pre-corona year of 2019. Their 7,5% sales growth against 2020 is equally significant, such that the loss of revenue that was expected at the start of the pandemic turned out to be far less serious than was initially feared. Servicing, repairs and updating work during the lockdown phases have made a major contribution to this growth.

In particular, a significant rise in revenue during 2019 to 2021 was generated by the IT Security industry, while security services also greatly increased their 2021 turnover compared with previous years.

Increase in turnover in sectors represented at Security Essen:

	2017	2019	2020	2021
Surveillance incl. service center	8.5	8.8	9.2	9.85
Electronic security technology	4.2	4.6	4.7	4.9
Static extinguisher systems	0.6	0.7	0.7	0.7
Locks and fittings	1.1	1.5	1.2	1.3
Safes and strongboxes	0.2	0.2	0.2	0.3
Mechanical perimeter protection	0.8	0.9	0.87	0.9
IT security	4.1	4.6	5.6	6.2
Total	19.5	21.3	22.47	24.15

Turnover in billion Euro. Sources: BDSW, VDMA, BHE, FVSB, FAS, Bitkom



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1) Security services

Sales in the security services sector grew by around 11.9% during the period 2019 to 2021, with the corona pandemic providing it with an ongoing turnover growth, unlike in other service sectors. Chief sources for this include the checks that had to be carried out in many places to implement the various corona rules, such as in retail businesses or individual companies. Surveillance assignments for vaccination centers and vaccination logistics provided additional work. Even so, staff shortages due to the pandemic and the growth in the amount of work pose a challenge, with many positions still vacant as indicated by the employment figures for 2020 and 2021 compared with 2019. Property security continues to take the main share of the 2021 turnover (50%), followed by airport security (11%), emergency call and service centers (10%) and then money and asset services (7%).

	2017	2019	2020	2021
Turnover (bn Euro)*	8.5	8.8	9.2	9.85
Employees (in 1000s)	258	265	262	259

Source: BDSW

2) Electronic security technology

The pandemic has also left its mark on the demand for electronic security technology, albeit not so negatively as initially feared. In 2020 this 'subdivision' of the security industry still achieved a small growth of 1.6% over 2019, with a turnover of 4.6 billion Euros. The situation significantly improved in 2021 with a rise of 6.2% over 2019 and a total turnover of around 4.9 billion Euros. Growth in 2021 over the pre-corona year of 2019 was seen in almost every sector with the exception of assault and intruder alarm systems with their slight drop of 1.2%. Video surveillance increased by a good 15% between 2019 and 2021, a result that can be attributed to the mobile, flexible solutions in this sector, especially for checking compliance with corona rules such as mask wearing and solutions for measuring temperatures, among others. Fire alarm systems also reported a solid growth of 5.5% during the same period. Fire safety benefited here from the stable construction industry in 2020 and 2021, combined with loans from the KfW bank and comparatively favorable mortgage interest rates. Burglar alarm systems suffered a decline in 2020 but in 2021 managed to show a slight increase of 0.6% against the previous year. As with video surveillance, the access control sector also benefited from modernization projects and the

requirement to impose pandemic restrictions. Turnover here grew 13.5% during the period 2019 – 2021. Smart access and payment systems continue to grow in the retail sector, while during the pandemic organizers continued to increasingly rely on mobile solutions for registration and tracking. One particular highlight is the jump in the sale of voice alarm systems with an above-average rise of 15%, with modernization projects in particular likely to be the driver for this growth during the pandemic.

	2017	2019	2020	2021
Fire alarm systems	1,950	2,170	2,200	2,290
Assault and burglar alarm systems	830	886	870	875
Access control	329	370	386	420
Video	540	607	650	700
Voice alarm systems	106	113	114	130
Other (heat and smoke extractors, call	428	473	475	490
Total	4,183	4,619	4,695	4,905

Figures in mn Euro. Source: BHE

3) Locks and fittings

In its 'security technology with protective effect' sector, the locks and fittings industry also enjoyed strong growth, with over 11.9% in 2021 compared with the previous year, not least owing to a stable construction industry. Mechanical security engineering continues to account for the largest share as against mechatronic and electronic security technology. With cylinder locks for building doors, the 2021 production volume totaled 126.5 million Euros for mechanical products compared with 44.1 million Euros for mechatronic and electronic products. A range of funding schemes at national, regional and local level plus increased initiatives to raise awareness of intruder protection have also had positive effects here, with the result that the pandemic has also been widely used for upgrades in private homes. The safes and strongboxes industry has also reported steady growth for some time now.

	2019	2020	2021
Safety technology with a protective effect	1.46	1.18	1.32

Figures in bn Euro. Source: FVSB

4) IT Security

This market segment has been included for the first time given the steadily growing importance of IT security for all trades and systems. Numerous reports of hacking attacks on businesses and the public sector have demonstrated the importance of IT security in an age of advancing digitizing in all areas of industry. Effective IT security is indispensable given the networking of trades (Internet of Things, IoT), the outsourcing of important functions and databases in the cloud, and the strong growth in the importance of AI. Cyber-attacks can have catastrophic effects on the economy and government agencies in particular, so the strong growth of almost 35% from 2019 to 2021 is not surprising.

Growth in 2021 was more than 10.7% over the previous year, with nearly 10% being the target for the current year. Services account for the biggest share of the total market by a long way, with 50%. Spending in 2021 compared with 2020 is reckoned to amount to 3.1 billion Euro, a rise of 9.8%. Security software is growing by 11.4%. Ongoing crises such as the Ukraine conflict should also contribute to the demand for IT security continuing to grow strongly in years to come, especially in the state sector, alongside awareness campaigns for industry and private users.

More information: www.security-essen.de