

Essen, September 20, 2018

The Security Market in Germany: Figures, Data and Facts About the Sector

In the period from 2015 to 2017 too, the German security market has continued its above-average growth in comparison with the overall economy. According to reports from the classic security sectors represented at Security Essen, the two-year comparison indicates a 18-percent plus to approx. Euro 17 billion. There was notable growth in nearly all subfields. The highest rate of increase was once more registered by the security services.

The development of the turnovers in the fields represented at Security Essen:

	2011	2013	2015	2017
Guarding, including central service offices	5.3	5.7	7.0	8.5
Electronic security technology	2.8	3.1	3.7	4.2
Stationary extinguishing installations	0.4	0.4	0.4	0.6
Locks and mountings	0.9	0.9	1.0	1.1
Safes and strongrooms	0.2	0.2	0.2	0.2
Mechanical shell security	0.6	0.6	0.7	0.8
Miscellaneous security technology	1.3	1.5	1.6	1.8
Total	11.5	12.4	14.5	17.2

Turnovers in Euro billions

Sources: Federal Association of Guard and Security Companies (BDSW), BHE Federal Association for Security Technology, Trade Association of the Locks and Mountings Industry (FVSB), Federal Association of Technical Fire Protection (bvfa) and estimates by experts

1) Security Services

In the two-year period from 2015 to 2017 too, the growth in the turnover in the security services continued with a 22.3-percent plus. The decisive factor was the constantly rising demand for private security services in Germany. The special effect caused by extended tasks in connection with the protection of refugee accommodation had ensured a high (approx. 40-percent) rise in the turnover in 2015 and 2016 which was "unhealthy" from the viewpoint of the sector but this



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Veröffentlichung kostenfrei –
Beleg erbeten
Publication free of charge –
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effect has weakened again. For 2017 compared with 2016, the sector therefore registered a 3.8-percent decline in the turnover to approx. Euro 8.5 billion. The main turnover contributors in the sector are property protection (50 percent), airport security (11 percent), the operation of emergency call and service control rooms (10 percent) as well as money and valuables services (7 percent).

Turnover of security services:

	2014	2015	2016	2017
Turnover (Euro billions)*	6.0	7.0	8.9	8.5
Employees (in thousands)	214	247	259	258

Source: Federal Association of Guard and Security Companies (BDSW)

* Economic Class 80 of the Federal Statistical Office

2) Electronic Security Technology

In the two-year comparison between 2015 and the end of 2017, it was possible to increase the turnover in the German market for electronic security technology by 12.7 percent to Euro 4.183 billion.

With a 15.4-percent plus in the comparison between 2017 and 2015, fire alarm installations achieved the greatest rate of increase in this market segment. In this period, video surveillance rose by 14.2 percent, intruder alarm technology by 12 percent, voice alarms by 11.6 percent and access control by 12.3 percent. The growth in the case of the fire alarm installations is closely linked with the good economic situation in recent years which promoted the construction investments not only in commerce and industry but also in the public sector. Moreover, the statutory smoke alarm obligation is ensuring higher sales figures. The plus with regard to voice alarm installations is partly based on the greater need to warn people in public offices or schools about particular dangerous situations more quickly. The greater awareness of hazards (here, triggered by the high number of domestic and commercial burglaries in recent years) is partly responsible also for the growth in the intruder alarm technology and the video surveillance technology. On the other hand, an upturn in the market has also been ensured by the fact that the Credit Institute for Reconstruction (KfW) has promoted intruder alarm technology.

Electronic security technology:

	2014	2015	2016	2017
Fire alarm installations	1,520	1,690	1,805	1,950
Hold-up and intruder alarm installations	690	741	800	830
Access control	285	293	307	329
Video	450	473	511	540
Voice alarm systems	90	95	100	106
Miscellaneous (smoke and heat extraction installations, call installations etc.)	410	421	420	428
Total	3,445	3,713	3,943	4,183

Turnover in Euro millions, source: BHE Federal Association for Security Technology

3) Locks and mountings

The persistently good economic situation in the building trade has ensured positive stimuli in the field of locks and mountings (in the two-year comparison, 10-percent plus to Euro 1.1 billion). For the future, the sector is in an optimistic mood because various promotion programmes of the federal government and the federal states for the energy-related restoration of buildings mean that the renovation market for windows and doors will also continue its positive development in parallel. Moreover, the greater awareness of hazards is leading to investments in locks and mountings too. For example, the sector is reporting that the end customers are increasingly interested in high-value security products for retrofitting, also irrespective of the burglary figures which have been lower again recently.