



2009 China Security and Protection
Market Research Report



2009 China Security and Protection Market Research Report

After three years' close attention and in-depth research of China's security and protection (hereinafter referred to as SP) industry, Sinotrust Industrial Market Research Services released the 2009 China Security and Protection Market Research Report in June 2009, covering all SP market players including manufacturers, contractors, system integrators, and distributors.

The 2009 China Security and Protection Market Research Report of Sinotrust offers:

- **Comprehensive Research Scope**

- **Full coverage of SP products:** the study covers all SP technologic products, focusing on Video surveillance system, burglar-alarm system, access control system, and intercom & patrol system.
- **Perspective from one end of the Value Chain to the other:** this study probes all stakeholders in China's SP industry value chain including manufacturers, contractors, agents, distributors, system integrators, MRO service (maintenance, repair & operation service) providers, through to customers and end users.
- **Holistic angle of content:** this study researches all aspects of China's SP market, consisting of market scale, large events, customers, channels, competition environment and so on.

- **Profound Insight**

Although featuring a wide coverage, the report is far from general talks, but conducts profound research in many crucial areas in China's SP market.

- **Understanding on 11 customer industries:** the report highlights intensive consumer industries study, featuring 1,500 consumer samples. 24 major consumer industries have been chosen and been clustered into 11 areas due to their similarities such as investment subject, application environment, and consumer demands and so on. this report proceeds with detailed studies of 11 key customers industries from different perspectives such as market size, market trend, customer behavior etc, including residential, industrial, office building, public transport centre, public facilities, government investment, finance, retail, entertainment, hotel, important repository of material
- **Key players profile in the market:** the report researches not only all types of SP enterprises from a general view, but also highlights the SP key enterprises in terms of their profits, channels, etc.
- **Trends and Opportunities:** Sinotrust analyses from various aspects the influence of large initiatives, plans and projects such as "peaceful cities", "Strengthening police through science & technology", "3111" projects, "4 trillion RMB government stimulus program for investment" and so on, which could affect China's SP market.
- **Current Products in the market:** concerning key products of SP industry such as camera and DVR, Sinotrust carries out in-depth analysis from the perspective of their technology, market scale, manufacturer concentration ratio, technology development etc.

- **Reliable Methodology**

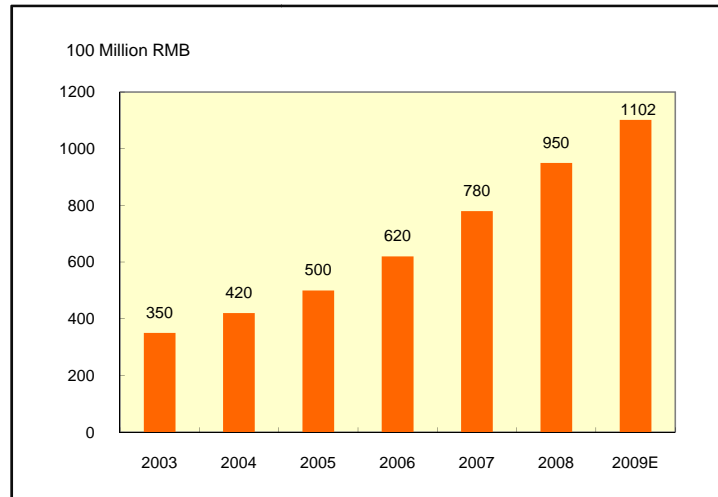
This report is entirely based on first-hand information as follows:

- **Approx. 500 in-depth interviews:** samples covering various SP participants.
- **2,000 quantitative interviews:** samples covering SP 11 major application industries.

2009 China Security and Protection Market Research Report

Report Extract

- 2003-2009 Market Size of China's SP industry



In 2008, although China's SP industry experienced natural disasters, financial crisis, increasingly rising cost, and dropping profits, driven by the government-sponsored projects and some significant events, the SP market maintained rapid and sustained development with growth rate exceeding 20 % and industry output reaching 950 billion RMB (including physical and technical protection market) .

- SP Customer Research

As the SP market competition intensifies and customers' requirements upgrades, it's vital and necessary for SP enterprises to gain a timely, comprehensive and in-depth understanding to their customers. The report has selected a total of 24 industries as research objects, which are clustered into fields according to their characteristics, with their market share as shown in the following diagram.

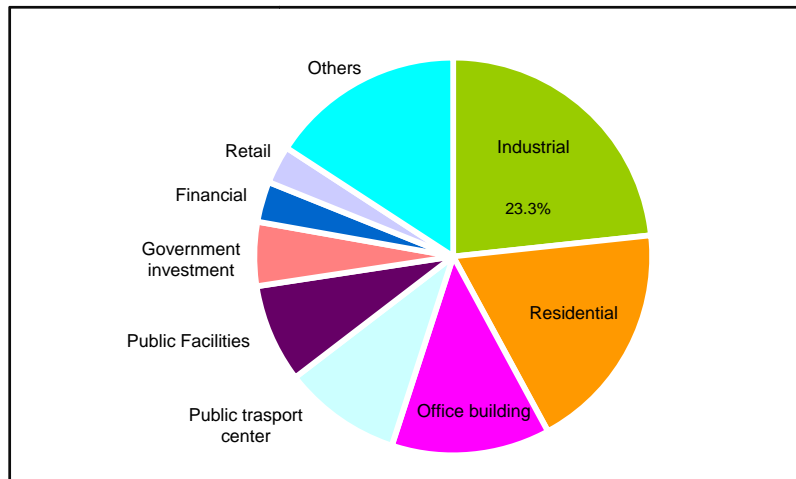
In terms of industries clustering, six industries have been generalized into one category: industrial fields owing to their similarities. The six industries include petrochemical, iron & steel, water conservancy project monitoring, mining, coal-fired power and water power industries.

The industrial fields has been chosen as an example of our display. The research result below has been trimmed.

2009 China Security and Protection Market Research Report

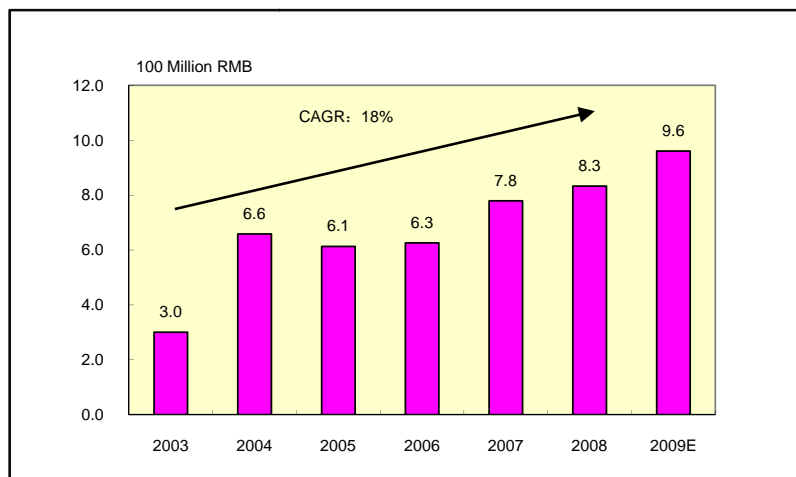
Report Extract

2008 China's SP 11 Customers Industries Market Share



The SP market size of industrial fields in 2003-2009

With the spread of SP products, the application keeps expanding from the very limited application in special institutes in 1980's to factories, public area, residential building in 21 century. And the industrial application has undergone considerable growth with CAGR of 18% from 2003 to 2009.



In 2008, the petrochemical industry was the largest SP investor, accounts for 39% in the industrial area, mainly owing to energy be of great strategic importance of national development, and the large volume of newly-added fixed investment in petrochemical industry.

2009 China Security and Protection Market Research Report

Report Extract

The key buying factors in industrial fields

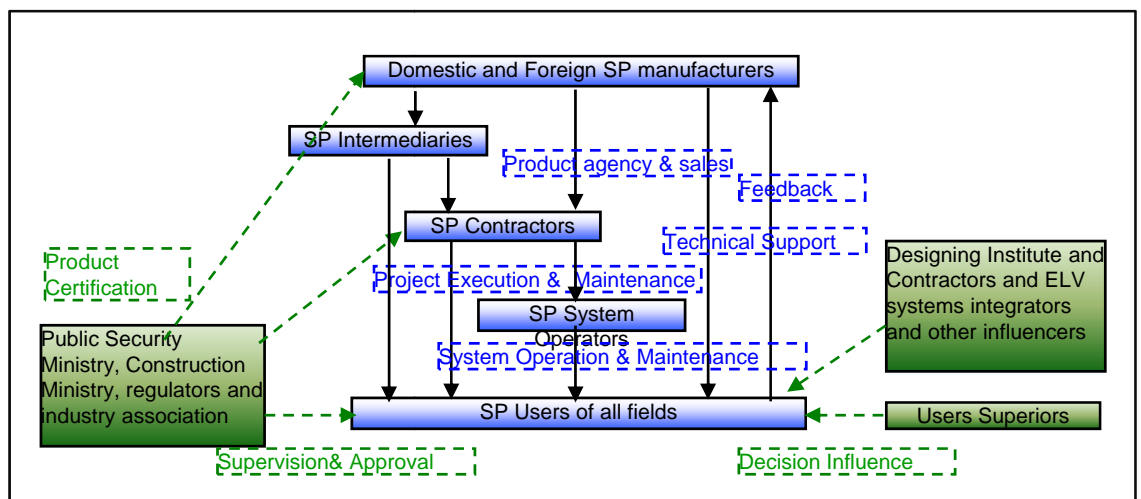
As for the key buying factors, customers in industrial areas regard the quality and performance of products as the most important factor, followed by technical support and after-sales service; but the price of the product is not very important, because security investment in industry has small proportion in the overall investment. In this field, foreign manufacturers have the advantages in the high quality products and new technology. In product procurement, less than one fifth consumers entrust engineering contractor for procurement and construction of SP project; in other occasion owners themselves participate in product sourcing, particularly, supervisor units taking the larger share in unified purchase.

The brand awareness in industrial fields

According to investigation, 30% of industrial consumers tend to use foreign brands of SP products. After all, the industrial area demands not high-level technical and performance of SP products. The durability of many domestic products is also competitive. With the wide spread of the industrial application, it can be predicted that the competition between foreign and domestic enterprises would be intense.

• China's SP Industry Value Chain Research

China's SP market is a comprehensive market, involved with multifaceted participants and influencers; the market value chain is shown as follows:





2009 China Security and Protection Market Research Report

Contents

Contents

Graphs and Tables

Brief Introduction

Terms and Definitions

China's Security Protection Market Overview

Chapter One: Status Quo of China's Security Protection Industry

1.1 China's Security Protection Industry Development Course

1.1.1 The History of China's Security Protection Industry

1.1.2 The lifecycle of China's Security Protection Industry

1.2 China's Security Protection Industry Market Size Estimation and Growth Research

1.3 The Factors Influencing the Development of China's Security Protection Industry

1.3.1 The Driving Factors Research

1.3.2 The Impeding Factors Research

1.4 Policies and Regulations for China's Security Protection Industry

1.4.1 2007-2008 Implemented Policies and Regulations for China's Security Protection Industry

1.4.2 Policies and Regulations Being Formulated

1.5 2008 New Technology and Products of China's Security Protection Market

1.5.1 2008 China's Security Protection Technology Trend

1.5.2 2008 China's Security Protection Technological Barriers

1.5.3 Key Security Protection Technology Research

Chapter Two: Analysis of the Segmentation of China's SP Market

2.1 Product-based Market Segmentation

2.2 Participant-based Market Segmentation

2.3 Region-based Market Segmentation

2.4 Customer-based Market Segmentation

Chapter Three: Analysis of China's Security Protection Market Distribution Channel

3.1 The Overview of China's Security Protection Market Distribution Channel

3.2 The Status Quo of China's Security Protection Market Distribution Channel

3.3 The Future Trend of China's Security Protection Market Distribution Channel

China's SP Enterprises Research

Chapter One: China's SP Enterprises Overview

1.1 The Profile of China's SP Enterprises

1.1.1 The Number, Output and Profit of China's SP Enterprises

1.1.2 The Market Status of China's SP Enterprises

1.2 China's SP Manufacturer Research

1.2.1 The Number of Various China's SP Manufacturer

1.2.2 The Key Success Factors and Future Trend of China's SP Manufacturer

1.2.3 The Market Concentration Level of China's SP Manufacturer

1.3 China's SP Contractor Research

1.3.1 The Number of Various China's SP Contractor

1.3.2 The Key Success Factors and Future Trend of China's SP Contractor

1.4 China's SP Intermediary Research

1.4.1 The Number of Various China's SP Intermediary

1.4.2 The Key Success Factors and Future Trend of China's SP Intermediary

1.5 China's SP System Operator Research

1.5.1 The Number of Various China's SP System Operator

1.5.2 The Key Success Factors and Future Trend of China's SP System Operator



2009 China Security and Protection Market Research Report

Report Extract

Chapter Two: Research on SP Manufacturers

- 2.1 Introduction to Local SP Manufacturers – Video Monitoring
 - 2.1.1 SINOCOME Group
 - 2.1.2 Tianjin YAAN Technology Electronics Co., Ltd.
 - 2.1.3 Nanwang Information Industry Co., Ltd.
 - 2.1.4 Hangzhou Hikvision Digital Technology Co., Ltd.
 - 2.1.5 Zhejiang Dali Technology Co., Ltd.
 - 2.1.6 Shenzhen Hongtianzhi Electronics Co., Ltd.
 - 2.1.7 Shenzhen Skyworth Qunxin Security Technology Co., Ltd.
 - 2.1.8 Shenzhen Hongdy Industrial Limited
- 2.2 Introduction to Local SP Manufacturers-Burglar Alarm Type
 - 2.2.1 Shenzhen Longhorn Industrial Co., Ltd.
 - 2.2.2 Xiamen Leelen Technology Co., Ltd
- 2.3 Introduction to local SP Manufacturers-Building Intercom Type
 - 2.3.1 Guangzhou Anjubao Technology Co., Ltd.
- 2.4 Introduction to local SP Manufacturers--Multiple Products type
 - 2.4.1 Shenzhen Safestnet Industrial Co., Ltd.
 - 2.4.2 Tianjin Tiandy Digital Technology CO., Ltd.
- 2.5 Introduction To Foreign-Invested SP Manufacturers
 - 2.5.1 Siemens Building Technology (China) Co., Ltd.
 - 2.5.2 GE Security (Asia Pacific) Co., Ltd.
 - 2.5.3 Bosch Security Co., Ltd.
 - 2.5.4 Honeywell Security Group
 - 2.5.5 Tyco Fire & Security (China)
 - 2.5.6 Samsung Electronics
- 2.6 Introduction to Domestic SP Contractors
 - 2.6.1 Beijing Univision-Shendun Security Technology Co., Ltd.
 - 2.6.2 Beijing Guanlin Yingke Intelligent System Integration Co., Ltd.
 - 2.6.3 Shanghai Guanlin Yinbao Technology Co., Ltd.

Chapter Three: Research on SP Contractors

Chapter Four: Research on SP Intermediate

Chapter Five: Research on SP

Chapter Six: Introduction to the Key Manufacturers, Contractors & Distributor

Research on China's SP Customers

Chapter One: Status Quo of the Customers in China's SP Industry

Chapter Two: Trend of Customers in China's SP Industry

- 2.1 SP Customer Sampling Distribution
- 2.2 The Summary of SP Customer Future Trend
- 2.3 Analysis of Decision-making and Purchasing Behaviors of Customers
- 2.4 Brand Awareness of SP Products by Customers
- 2.5 The Future Development Status of SP Products Applied By Customers

Chapter Three: Research on 11 Customer Fields in China's SP Industry

- 3.1 SP Market Research on Chinese Real Estate Sector
 - 3.1.1 Overview of Chinese Real Estate Sector
 - 3.1.2 Estimates of market capacity, and analysis of the potential for SP products in Chinese Real Estate Sector



2009 China Security and Protection Market Research Report

Contents

- 3.1.3 The Application Environment and Analysis of Customer Purchasing Behavior
- 3.1.4 Future trend of SP Products in Chinese Real Estate Sector
- 3.2 SP Market Research on Chinese Government Investment Sector
 - 3.2.1 Overview of Chinese Government Investment Sector
 - 3.2.2 Estimates of market capacity, and analysis of the potential for SP products in Chinese Government Investment Sector
 - 3.2.3 The Application Environment and Analysis of Customer Purchasing Behavior
- 3.3 SP Market Research on Financial Sector
 - 3.3.1 Overview of Financial Sector
 - 3.3.2 Estimates of market capacity, and analysis of the potential for SP products in Financial Sector
 - 3.3.3 The Application Environment and Analysis of Customer Purchasing Behavior
- 3.4 SP Market Research on Public Transportation Junction Sector
 - 3.4.1 Overview of Public Transportation Junction Sector
 - 3.4.2 Estimates of market capacity, and analysis of the potential for SP products in Public Transportation Junction Sector
 - 3.4.3 The Application Environment and Analysis of Customer Purchasing Behavior
- 3.5 SP Market Research on Industrial Sector
 - 3.5.1 Overview of Industrial Sector
 - 3.5.2 Estimates of market capacity, and analysis of the potential for SP products in Industrial Sector
 - 3.5.3 The Application Environment and Analysis of Customer Purchasing Behavior
- 3.6 SP Market Research on Hotel Sector
 - 3.6.1 Overview of Hotel Sector
 - 3.6.2 Estimates of market capacity, and analysis of the potential for SP products in Hotel Sector
 - 3.6.3 The Application Environment and Analysis of Customer Purchasing Behavior
- 3.7 SP Market Research on Industrial Sector
 - 3.7.1 Overview of Industrial Sector
 - 3.7.2 Estimates of market capacity, and analysis of the potential for SP products in Industrial Sector
 - 3.7.3 The Application Environment and Analysis of Customer Purchasing Behavior
- 3.8 SP Market Research on Office Building Sector
 - 3.8.1 Overview of Office Building Sector
 - 3.8.2 Estimates of market capacity, and analysis of the potential for SP products in Office Building Sector
 - 3.8.3 The Application Environment and Analysis of Customer Purchasing Behavior
- 3.9 SP Market Research on Store and Supermarket Sector
 - 3.9.1 Overview of Store and Supermarket Sector
 - 3.9.2 Estimates of market capacity, and analysis of the potential for SP products in Store and Supermarket Sector
 - 3.9.3 The Application Environment and Analysis of Customer Purchasing Behavior
- 3.10 SP Market Research on Cultural, Sports & Entertainment Sector
 - 3.10.1 Overview of Cultural, Sports & Entertainment Sector
 - 3.10.2 Estimates of market capacity, and analysis of the potential for SP products in Cultural, Sports & Entertainment Sector
 - 3.10.3 The Application Environment and Analysis of Customer Purchasing Behavior
- 3.11 SP Market Research on Important Materials Storage Sector



2009 China Security and Protection Market Research Report

Contents

- 3.11.1 Overview of Important Materials Storage Sector
- 3.11.2 Estimates of market capacity, and analysis of the potential for SP products in Important Materials Storage Sector
- 3.11.3 The Application Environment and Analysis of Customer Purchasing Behavior

Key Events in China's SP Industry

Chapter One: China's SP Industry in The Context of Financial Crisis

- 1.1 Overview of China's SP Industry in The Context of Financial Crisis
- 1.2 China's SP Industry Influenced by Governmental Sponsored "4 Trillion RMB" Investment
- 1.3 The Opportunities Brought by "Comfortable Housing Project" to China's SP Industry

Chapter Two: Peaceful Cities and Enhancing Police Strength through Science & Technology

- 2.1 The SP Market Size and Status Quo Created by "Peaceful Cities" and "Enhancing Police Strength through Science & Technology" Project
- 2.2 The Policies and Technologic Standards of "Peaceful Cities" and "Enhancing Police Strength through Science & Technology" Project
- 2.3 The SP Industry Future Development Influenced by "Peaceful Cities" Project

Chapter Three: IPO and M&A in China's SP Industry

- 3.1 Analysis of Chinese SP Enterprise IPO
- 3.2 Analysis of Chinese SP Industry Typical M&A (CSST M&A)
- 3.3 The Summary of Chinese SP Industry Capital Operation

Chapter Four: Dynamic of Network Video Monitoring

- 4.1 Overview of Network Video Monitoring Development
- 4.2 Analysis of IT Enterprise Entering Into SP Industry
- 4.3 Telecom Operators Launching Network Video Monitoring Business

Note: The contents are subject to slight changes. Please refer to the final report.



2009 China Security and Protection Market Research Report

Graphs and Tables

- Chart 1 China SP Industry Development Circle
- Chart 2 China SP Industry Life Circle Analysis
- Chart 3 The Market Size of China SP
- Chart 4 The Product Breakdown of China SP
- Chart 5 The Quantity And Produce Ability of China SP Companies
- Chart 6 The Value Chain of China SP
- Chart 7 Changes of Various SP Companies' Market Place
- Chart 8 Ownership Breakdowns of China SP Companies
- Chart 9 Market Value Breakdowns of China SP Companies
- Chart 10 The Centralization Level of China SP Companies
- Chart 11 SP Engineering Project Timeline
- Chart 12 China SP Consumers Sampling
- Chart 13 The Market Covering of 11 China SP Consumers In 2008
- Chart 14 The Market Demand Breakdown of China SP Industry In 2008
- Chart 15 Importance Analysis of Market on 11 China SP Consumers
- Chart 16 Basic Investment Structure of China Real Estate Industry
- Chart 17 Additional Investments in Real Estate Industry Recently
- Chart 18 Additional New-Constructed Areas of Households Recently
- Chart 19 Investment Amount of SP Consumption by Households Recently
- Chart 20 Household Purchase Decision-Making Timeline
- Chart 21 Fixed Assets Investment of Central and Local Governments Recently
- Chart 22 Decision-Making Timeline of Government Purchase of SP Products
- Chart 23 Percentages of Total Product Value And
- Chart 24 Newly Added Fixed Asset Investment to China Petrol
- Chart 25 Newly Added Fixed Asset Investment to China Steel Smelting and Processing Industry
- Chart 26 Newly Added Fixed Asset Investment to China Irrigation Works
- Chart 27 Investments Breakdown to SP of Various Industries
- Chart 28 Compulsory SP Regulations Related To Producing Industry
- Chart 29 Typical SP Purchasing Timeline of Producing Industry
- Chart 30 Major Investment Object to SP Project in Producing Industry
- Chart 31 Critical Decision-Makers to SP Project in Producing Industry
- Chart 32 Purchasing Timeline of SP Product in Hotel Industry
- Chart 33 The Relation between "Strengthening Police through Science & Technology" And "Peaceful Cities"
- Chart 34 Investments of "Strengthening Police through Science & Technology" And "Peaceful Cities"
- Chart 35 Participants of "Strengthening Police through Science & Technology" And "Peaceful Cities"
- Chart 36 Percentages of Demanded Products of "Strengthening Police through Science & Technology" And "Peaceful Cities"
- Chart 37 Comparisons of 3 Monitor Systems

2009 China Security and Protection Market Research Report

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