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Homeland Security and Emergency Management Market, 2013-2018

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This report presents a complete analysis of the global homeland security market across the next five years. It analyses about the factors driving the market, the challenges faced by the industry and about the factors restraining the growth of the market. It also discusses the key industry trends, market trends and technology trends that is about to influence the global homeland security market. It provides a complete market size of the global homeland security market over the next five years and talks about the market share by different sub-sectors. It provides insight in to regional trends in spending and analysis the market size by region and also provides data on spending patterns by sub-sector for each region. It tracks, analysis and lays out the market size of the major defense spenders in each region and provides market share by sub category namely, Aviation Security, Mass Transit Security, Maritime Security, Critical Infrastructure Security, Cyber Security, Border Security, CBRN Security, Counter-Terror Intelligence, IT & C3I and First Responders. It talks about leading competitors in the global homeland security market and apart from a general overview of the companies it also provides details on their financial position, key products and markets and key developments.

The Global Homeland Security Market is estimated to be \$415.53 billion in 2013 and is expected to register a CARC of 5.54% to reach \$544.02 billion by 2018. The threat of cross border terrorism, cybercrime, piracy, drug trade, human trafficking, internal dissent, separatist movements has been a driving factor for the homeland security sector. The sector is highly competitive with a host of industry participants vying for contracts and the tightening financial situation in most western countries is expected to increase competition. Budget cuts in most of the western countries are anticipated to have minimal impact on the homeland security market; however, spending on cyber security, surveillance systems, IT and communications systems is set to increase. The industry is fragmented and most of the tier-1 players are from US and Europe. These firms have the required know-how and technology and have an active presence across the globe thus making the major share holders in this growing market. Increase in merger and acquisition, technology transfer, joint development and production and partnerships and offset agreements between western and other developing nations are anticipated.

Summary

Global homeland security market is estimated to be US\$415.53 billion in 2013 and is expected to register a CARC of 5.54% to reach US\$544.02 billion by 2018. The cumulative market for homeland security during the forecast period is estimated at US\$2842.47 billion. However, about 15% of that total is expected to be the capital expenditure.

Homeland security functions to avert any terrorist attacks on the homeland and to provide resilience in case of an attack. It also has to provide credible security against cyber fraud and cyber espionage and provide detection and protection capabilities against CBRN threats. The threat of cross border terrorism, cybercrime, piracy, drug trade, human trafficking, internal dissent, separatist movements has been a driving factor for the homeland security market.

The risk of terrorist attack has led to an increase in aviation security spending. The illegal arms and drug trafficking and immigration has led to heightened border and seaport security and has increased the demand for explosive detection systems, body scanners and baggage screening systems. The threat of a cyber attack disrupting public and private network and infrastructure has driven the cyber security spending across the past decade. The need for effective identification and security checking and the need to provide access control to critical infrastructure have led to the adaptation biometric and other identification technologies.

The general IT modernization has greatly improved record keeping and coordination of cases across the internal security department and thus has gained wide acceptance across the world and is seen as yet another driver in the homeland security sector. Similarly the need for effective command, control and intelligence apparatus for the first responders has led the need for effective C3I systems. The upgrading of border security and the demand for effective immigration control has fueled the need for biometrics, fixed surveillance devices, and unmanned aerial vehicles.

US and Europe are expected to remain as the main market for homeland security systems and the region has the top industry participants who cater to this sector. The second biggest growth opportunity is from the Asia Pacific region where the growing economies are set to increase their homeland security expenditure. Opportunity also exists in Middle East, followed by Latin America and Africa. Although Asian market especially China's internal security spending is significantly higher than US, it is of less interest as the market is restricted to western firms.

This Global homeland security market research report categorizes the global market on the basis of homeland security sub-sector, geography and by country; forecasting revenues, market share and analyzing trends in each of the sub sectors:

On the Basis of Homeland Security Sub-sector:,

This market is segmented on the basis of revenue generated across the various sub-sectors:

- Aviation Security
- Mass Transit Security
- Maritime Security
- Critical Infrastructure Security
- Cyber Security
- Border Security
- CBRN Security
- Counter-Terror Intelligence
- IT & C3I
- First Responders
- On the basis of Geography

GLOBAL HOMELAND SECURITY MARKET: REVENUE FORECAST BY SUB-SECTOR, 2013–2018 (\$ BILLION)



Geography is classified into,:

- North America
- Europe
- Middle East
- Africa
- Asia
- Latin America
- On the basis of Country

The following countries are covered in this report:

- Australia
- Brazil
- Canada
- France
- Germany
- India
- Israel
- Mexico
- Russia
- Saudi Arabia
- South Africa
- United Kingdom
- United States

STAKEHOLDERS:

- All departments pertaining to homeland security, public safety, Internal affairs and Home affairs
- Armed Services
- Defense and Security system manufacturers
- IT and cyber security service providers
- Sub-component Manufacturers

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