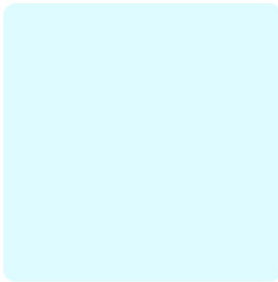
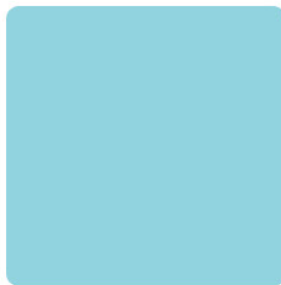


# Surveillance, Control & Protection

## Industry Analysis Report

2013.05



**Made-in-China.com**



Produced by IAR Team  
Focus Technology Co., Ltd.

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## 1. Security & Protection Industries Overview

After long-term development, Chinese security industry has formed the “Pearl River Delta” in geographical distribution, and with the gathering of the manufactures of the electronic security products, The Yangtze River Delta region with the feature of gathering the manufactures of hi-tech and foreign-investment, The Bohai Rim with the feature of gathering of the manufactures of the integration applications, software, service companies. All of them occupied the two thirds of market share.

At present, the Chinese security industry is mainly composed by the following types of companies: A: Program Companies who mainly focus on the design, installation, service. B: Distribution Agency who focus on the sale issues. C: Suppliers who is engaged in produce and supplier the security products. D: Service Provider who is responsible for the brokerage, advisory. E: Operator who is in charge of the alarm operational service.

According to statistics, In 2012 430 new entrants will enter the security industry and most of them are medium-sized and small enterprises. Closure or restructuring of about 110 companies. In total, there are 320 new entrants step in the safe & security industry. New entrants into the business mostly concentrated in the field of video surveillance, building intercom, burglar alarms and access control field is relatively small.

It is a calm and relatively tough year for the security industry in 2012. Throughout 2012 China security market, the overall situation is: the market demand continues to heat up, the industry continues to maintain a high degree of economy, some items are lack of advantage, The firms with low ability to resist risks benefits decline.

Overall, 2012 Security Industry still gained rapid development even affected by the various disadvantageous, the annual growth rate of approximately 16.8% (decrease significantly, the data compared with last year), industry output is expected to 324 billion RMB, Product market which accounted for 41% about 136.5 billion RMB; Program and Services accounted for 59% about 196.5 billion RMB. The whole year had added value of about 38 billion RMB.

As competition intensified, Our security companies have increased pace in innovation, the industry overall technological level greatly improved, especially in high-definition, intelligence, system platforms and video surveillance software, etc., Innovation enthusiasm is remarkable. All above have stimulate many fresh & Hi-tech products. Therefore, these areas have become the fastest growing market.

In 2012, the market competition accelerated the industry supply chain integration. Smart City, HD-SDI, intelligence analysis, system platforms, networking, cloud computing become the most popular topic in security industry in 2012, which reflects the industry's future development direction.

## 2. China Surveillance, Control & Protection industry export trend analysis

HS Code	Product Name
852190	Nes video recording or reproducing apparatus, the following abbreviated "DVR"
852580	Television cameras, digital cameras and video camcorders, referred to as "surveillance cameras" as the following.

### 2.1. 2012 January-December China DVR (HS: 852190) export trend analysis

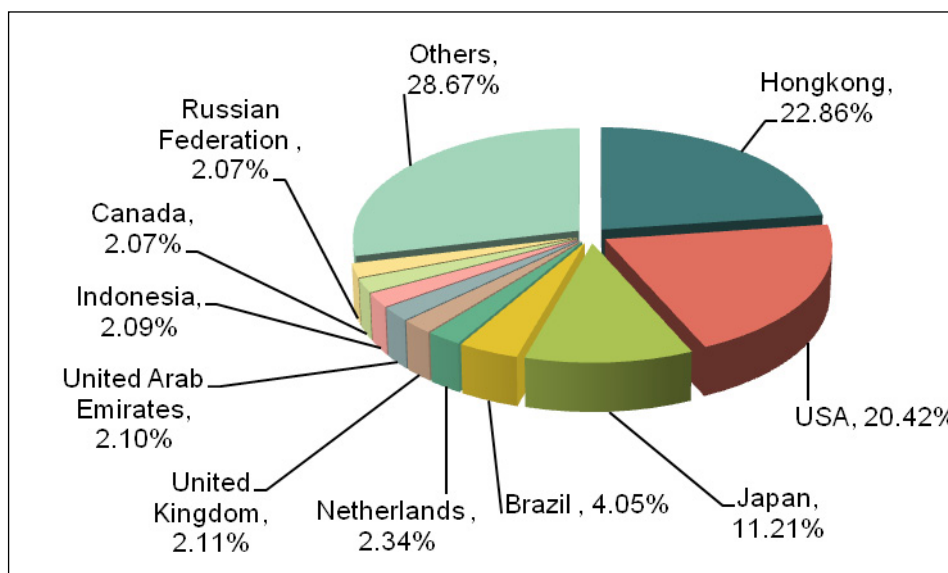
#### 2.1.1. 2012 January-December China DVR (HS: 852190) exporting quantity and value

Month	Quantity(Unit)	Aggregate Amount	Compared to the last year	
			Quantity	Amount
Jan.	10,844,685	444,393,799	-20.7%	-27.7%
Feb.	6,869,365	344,241,933	-27.8%	-28.3%
Mar.	10,633,678	487,085,451	-11.9%	-16%
Apr.	13,616,746	653,600,015	-4.5%	5.3%
May	13,000,587	588,783,099	-1.8%	-3.8%
Jun.	11,008,837	480,680,894	-20%	-24.5%
Jul.	10,344,319	427,995,673	-27.4%	-34.8%
Aug.	11,501,235	449,053,609	-23.5%	-32.3%
Sep.	14,403,276	561,357,017	-15.5%	-26.5%
Oct.	15,655,131	653,585,433	-8%	-15.2%
Nov.	13,144,683	688,300,302	-13.9%	-0.7%
Dec..	13,421,167	585,339,880	4.3%	6.8%
Jan.-Dec. total	144,443,709	6,364,417,105	-14%	-16.7%

China DVA export number is about 144 million units in January ~ December 2012. Export amounted to \$ 6.36 billion. Export volume fell 14 percent, exports fell 16.7%.

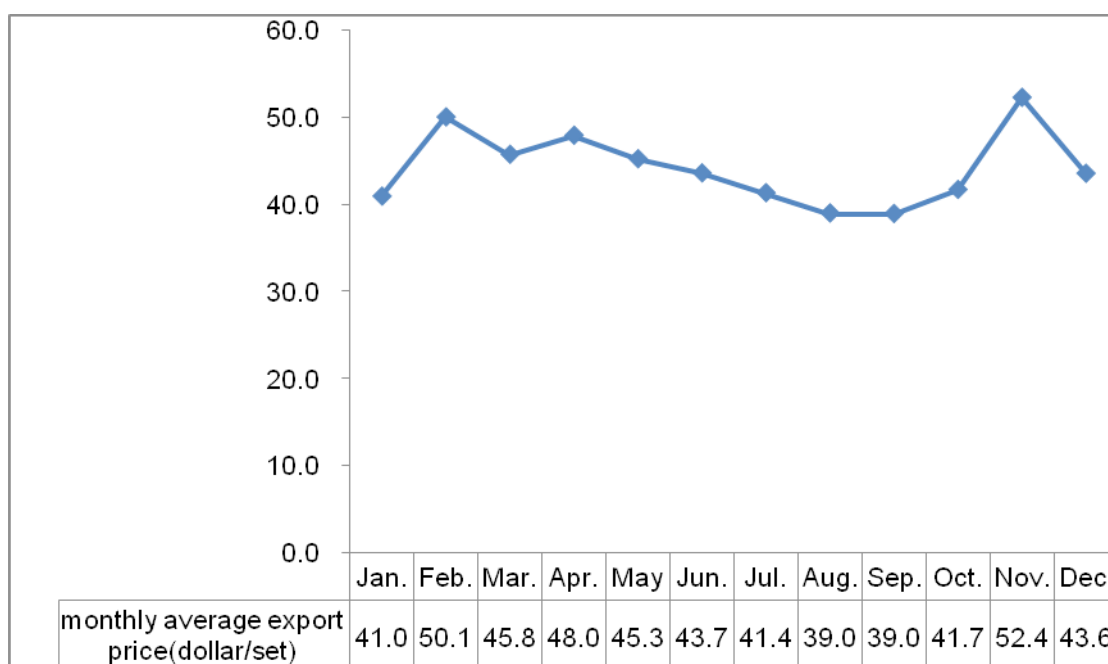
## 2.1.2. 2012 January-December China DVR (HS: 852190) exporting Countries/Regions

Number	Countries/ Regions	Quantity(Unit)	Amount(USD)	Compared to the last year	
				Quantity	Amount
1	Hongkong	25,047,886	1,454,869,687	5.9%	35.3%
2	USA	26,686,256	1,299,785,807	-21.1%	-22.2%
3	Japan	6,109,615	713,514,431	-39%	-54.8%
4	Brazil	8,291,058	257,530,550	-9.3%	-11.7%
5	Netherland	3,073,362	148,920,420	-17.1%	-16.4%
6	British	2,862,053	134,459,260	-17.8%	-26.6%
7	The United Arab Emirates	3,603,524	133,904,635	-16.3%	-13.4%
8	Indonesia	5,854,377	133,117,736	14.6%	30.9%
9	Canada	3,655,504	132,037,627	-14.1%	-25.4%
10	Russia	3,043,979	131,656,941	-7%	-7%



2012 January-December, In the top ten export countries / regions, Chinese DVR export volume decreased in which of nine countries. From the export volume, the export volume fell by a big margin was Japan (down 39%); Witness the exports amount, exports fell distinctly is Japan (down 54.8%), Hong Kong (up 35.3%) and Indonesia (up 30.9%) are two distinctly targeted export country according to the export amount.

## 2.1.3. 2012 January-December China DVR (HS: 852190) monthly average export price trend



With the view from the chart above, in January ~ December 2012, the average highest peak export price of DVR in November, 52.4 USD / unit, followed in February, 50.1 USD / unit, The depression period in August and September.

## 2.1.4. 2012 January-December China DVR (HS: 852190) export source region.

Number	Countries/ Regions	Quantity(Unit)	Amount(USD)	Compared to the last year	
				Quantity	Amount
1	Guangdong Province	125,882,774	5,011,097,061	-15.6%	-15.2%
2	Liaoning Province	2,089,996	373,804,216	-45.3%	-45.5%
3	Shanghai	2,928,105	297,316,247	1.7%	3.3%
4	Tianjin	3,836,936	251,570,743	7.2%	-3.8%
5	Zhejiang Province	1,891,846	177,870,275	41.5%	15.8%
6	Shandong Province	5,028,521	125,101,747	73.5%	26.2%
7	Jiangsu Province	907,521	61,188,021	-53.4%	-57.7%
8	Fujian Province	698,734	33,903,032	-55.5%	-49.6%
9	Jiangxi Province	467,519	15,635,444	-0.8%	-8.5%
10	Hunan Province	56,366	3,489,747	-5.2%	-32.3%

Guangdong, Liaoning, Shanghai, Tianjin and Zhejiang are main export source region of DVR in China. The DVR export quantity of these 5 areas has accounted for 94.6%, Export amount accounted for China's total exports 96%. In top 10 DVR export source region, Shandong province is the largest increase and the export quantity rose by 73.5 percent, export amount increase by 26.2% compared to the last year.



## 2.2. 2012 January-December China surveillance cameras (HS: 852580) export trend analysis.

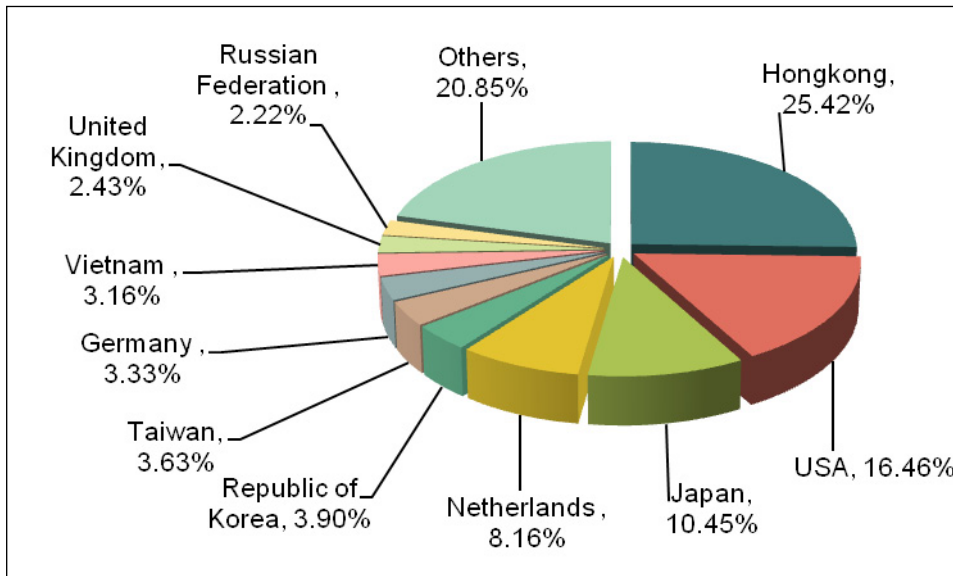
### 2.2.1. 2012 January-December China surveillance cameras (HS: 852580) export quantity and amount:

Month	Quantity(Unit)	Amount(USD)	Compared to the last year	
			Quantity	Amount
1	52,240,355	659,499,869	-18.6%	-5.8%
2	59,667,833	868,321,010	9.8%	33.8%
3	72,299,132	1,155,246,329	-19.6%	7.2%
4	59,848,704	1,065,276,300	-18.6%	17.7%
5	65,396,584	971,035,173	-17.8%	-3.1%
6	64,075,038	904,590,636	-25.1%	-7.8%
7	62,781,585	910,628,376	-27.8%	-7.4%
8	72,435,480	1,150,748,048	-24%	5.9%
9	83,158,335	1,214,226,156	-5.3%	3.8%
10	80,089,270	1,338,333,887	-10.3%	17.4%
11	88,840,372	1,402,566,290	17.2%	47.2%
12	78,061,230	1,103,109,566	-3.1%	18%
1-12	838,893,918	12,743,581,640	-12.9%	10%

January to December 2012, the total amount of export quantity of surveillance camera is about 839 million units, export amount have approached \$ 12.74 billion. Export quantity has increased by 12.9%, export amount increased by 10% compared with the last year.

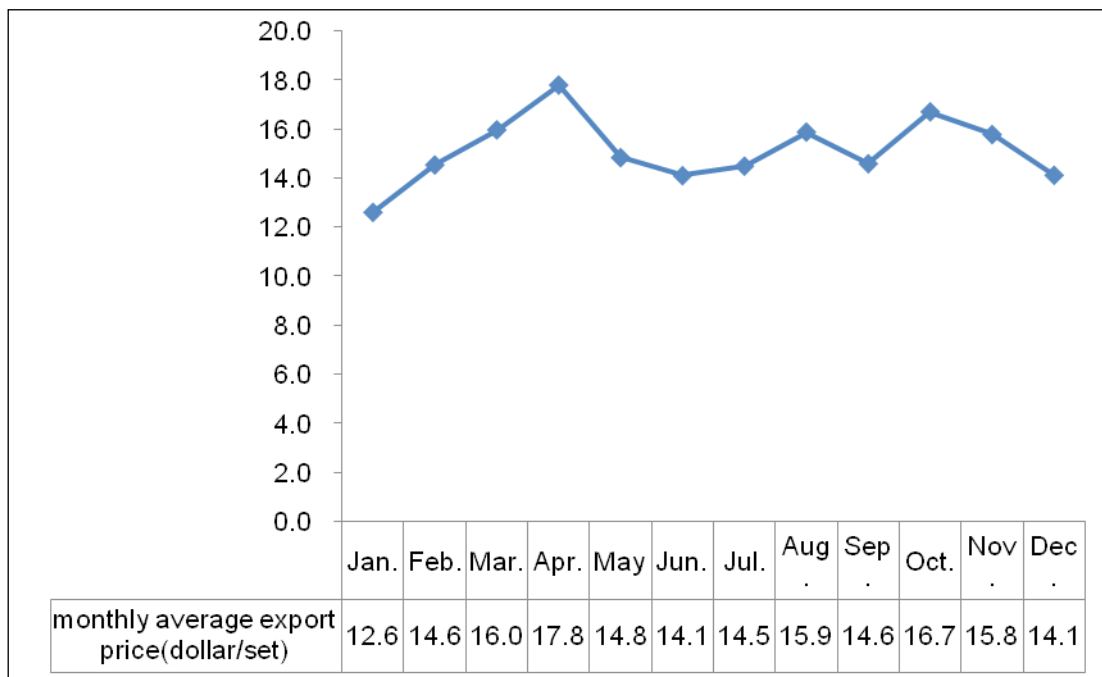
### 2.2.2. 2012 January-December, China surveillance cameras (HS: 852580) main export countries / geographical distribution

Number	Countries/ Regions	Quantity(Unit)	Amount(USD)	Compared to the last year	
				Quantity	Amount
1	Hong Kong	406,876,089	3,239,423,052	0.4%	22.7%
2	America	39,482,330	2,097,236,230	-23.7%	-10%
3	Japan	17,771,361	1,331,151,161	15.4%	51.5%
4	Netherland	18,696,371	1,040,045,167	2.4%	28.7%
5	Korea	75,914,756	496,377,168	-29.3%	3.9%
6	Taiwan Province	13,010,447	462,446,629	-9.1%	238.5%
7	Germany	7,546,508	424,486,560	-22.8%	-21%
8	Vietnam	60,351,626	402,648,657	85.3%	112.6%
9	British	5,650,810	309,479,392	-4.5%	-3.8%
10	Russia	5,956,626	283,183,332	9.5%	4.7%



2012 January-December, In the top 10 targeted export countries, the surveillance camera export quantity of these 5 areas has increased. With the export quantity vision, Vietnam have imported the large quantity which increased by 85.3% compared to the last year. With the import amount vision, Taiwan Province has listed No.1 increased by 238.5% and Vietnam also have increased by 112.6% compared to the last year.

### 2.2.3. In January-December 2012, China surveillance cameras (HS: 852580): Monthly average export price trend



As you know from the chart above, Chinese average highest export quotation of surveillance camera in April: \$17.8 / unit, the lowest in January \$ 12.6/ unit.



## 2.2.4. In January ~ December 2012, China Surveillance camera (HS:852580) export source area:

Number	Region	Quantity	Amount(USD)	Compared to the last year	
				Quantity	Amount
1	Guangdong Province	508,261,471	5,209,823,569	-20.4%	-14.6%
2	Jiangsu Province	93,433,255	4,070,179,734	44.8%	66.1%
3	Tianjin	89,802,282	1,386,964,492	-22.5%	16.6%
4	Shanghai	10,353,833	810,145,560	30.5%	22.7%
5	Fujian Province	4,953,764	369,749,098	-9.8%	-20.8%
6	Jiangxi Province	7,657,217	293,324,768	103.5%	60.8%
7	Zhejiang Province	20,883,675	238,737,203	32.2%	72.6%
8	Shandong Province	66,264,444	203,859,206	9%	37.5%
9	Shanxi Province	33,367,986	100,777,685	-25.4%	-31.2%
10	Beijing	498,307	21,838,425	-12.9%	3.2%

From January to December 2012, Guangdong, Jiangsu, Tianjin and Shanghai are main surveillance camera export sources in China. These four areas of surveillance cameras export quantity accounted for 83.7% of total exports. Export amount accounting for 90.1% of total exports. In the top 10 export area of surveillance camera, Jiangxi is the largest export quantity in surveillance camera has increased by 103.5%. Zhejiang is the largest export amount has increased by 72.6% compared to the last year.

(Data Source: China Customs Website)

## 3. Global Surveillance, Control & Protection Industry import and export

### 3.1. January-December 2012, Global Surveillance, Control & Protection industry imports

#### 3.1.1. January-December 2012 DVR (HS: 852190) major importing countries / regions

No.	Import Countries/Regions	Import Amount (one thousand USD)	Compared to the last year
1	America	1,781,276	-18.3%
2	Japan	1,063,952	-50.4%
3	Netherland	643,711	-14%
4	Germany	541,493	-16.2%
5	France	450,131	-52.2%
6	Canada	427,207	-30.3%
7	Australia	408,391	-11.8%
8	British	384,232	-52.4%
9	Mexico	287,283	-7.1%
10	Belgium	221,874	-18.1%
11	Russia	205,609	-5.3%
12	Brazil	163,147	-16%
13	Sweden	152,351	-17.6%
14	Thailand	144,136	4.1%
15	Slovakia	135,808	-8.6%
16	Singapore	132,790	-9.6%
17	Italy	120,504	-44%
18	Chinese	108,055	-19%
19	India	100,900	-24.7%
20	Poland	91,275	-26.8%

From January-December 2012, Twenty DVR importing country / region above, the United States, Japan and the Netherlands were the top three, imports amounts approximate \$ 1.78 billion (decrease by 18.3%), \$ 1.06 billion (decrease by 50.4%), \$ 644 million (decrease 14%) respectively. Of which, UK DVR import amount is the most decreased, decrease by 52.4%, as the followed is France, decrease by 52.2%.

## 3.1.2. January-December 2012 Surveillance Camera (HS: 852580) major importing countries / regions

No.	Countries/Regions	Import Amount (one thousand USD)	Compared to the last year
1	China	9,928,809	50.9%
2	USA	7,544,151	0.4%
3	Netherlands	3,227,672	16.9%
4	Germany	2,710,597	-6.1%
5	Japan	2,080,405	18.7%
6	Russian Federation	1,583,131	20.2%
7	United Kingdom	1,313,247	-10.2%
8	Singapore	1,304,139	10.7%
9	France	1,202,846	-4.9%
10	Canada	1,072,493	2.6%
11	Taiwan	742,890	-21%
12	Australia	731,116	6.5%
13	Republic of Korea	718,634	4%
14	Mexico	703,740	-1.1%
15	Italy	642,804	-24.6%
16	Slovakia	604,053	27.2%
17	India	585,356	26.1%
18	Spain	562,546	-17%
19	Sweden	473,517	-4.8%
20	Thailand	463,607	17.3%

From January-December 2012, Twenty Surveillance Camera importing country / region above, China, the United States and the Netherlands were the top three, imports amounts approximate \$ 9.93 billion (increase by 50.9%), \$ 7.54 billion (increase by 0.4%), \$ 3.23 billion (increase by 16.9%) respectively.

## 3.2. From January-December in 2012, Global Surveillance, Control & Protection industry exports

### 3.2.1. 2012 January-December-- DVR (HS: 852190) main export country / region

No.	Export Country/Region	Export Amount (one thousand USD)	Compared to the last year
1	China	6,364,350	-16.7%
2	Indonesia	657,741	-15.5%
3	Malaysia	532,621	-37%
4	USA	457,685	-13.7%
5	Netherlands	382,157	-37%
6	Slovakia	295,939	-23.5%
7	Korea	281,179	-13.2%
8	Czech Republic	206,050	-58.5%
9	Germany	184,761	-22.6%
10	Belgium	165,604	-9.9%
11	Romania	159,843	-44.3%
12	Taiwan Province	155,795	-18.7%
13	British	126,149	-48.5%
14	Mexico	119,740	1.5%
15	Singapore	110,582	-1.5%
16	Japan	109,095	-13.0%
17	Sweden	89,701	-14.0%
18	Canada	71,450	-33.6%
19	France	63,675	-40.4%
20	Thailand	45,009	-17.3%

2012 January-December, twenty DVR exporting countries / regions above, China ranked the first, with exports of 6.36 billion USD, decreased by 16.7 percent, Indonesia and Malaysia were ranked second, third respectively, export amounts are \$ 658 million USD (decrease by 15.5 percent), \$ 533 million USD (decrease by 37%).

## 3.2.2. 2012 January-December --Surveillance cameras (HS: 852580) main export country / region

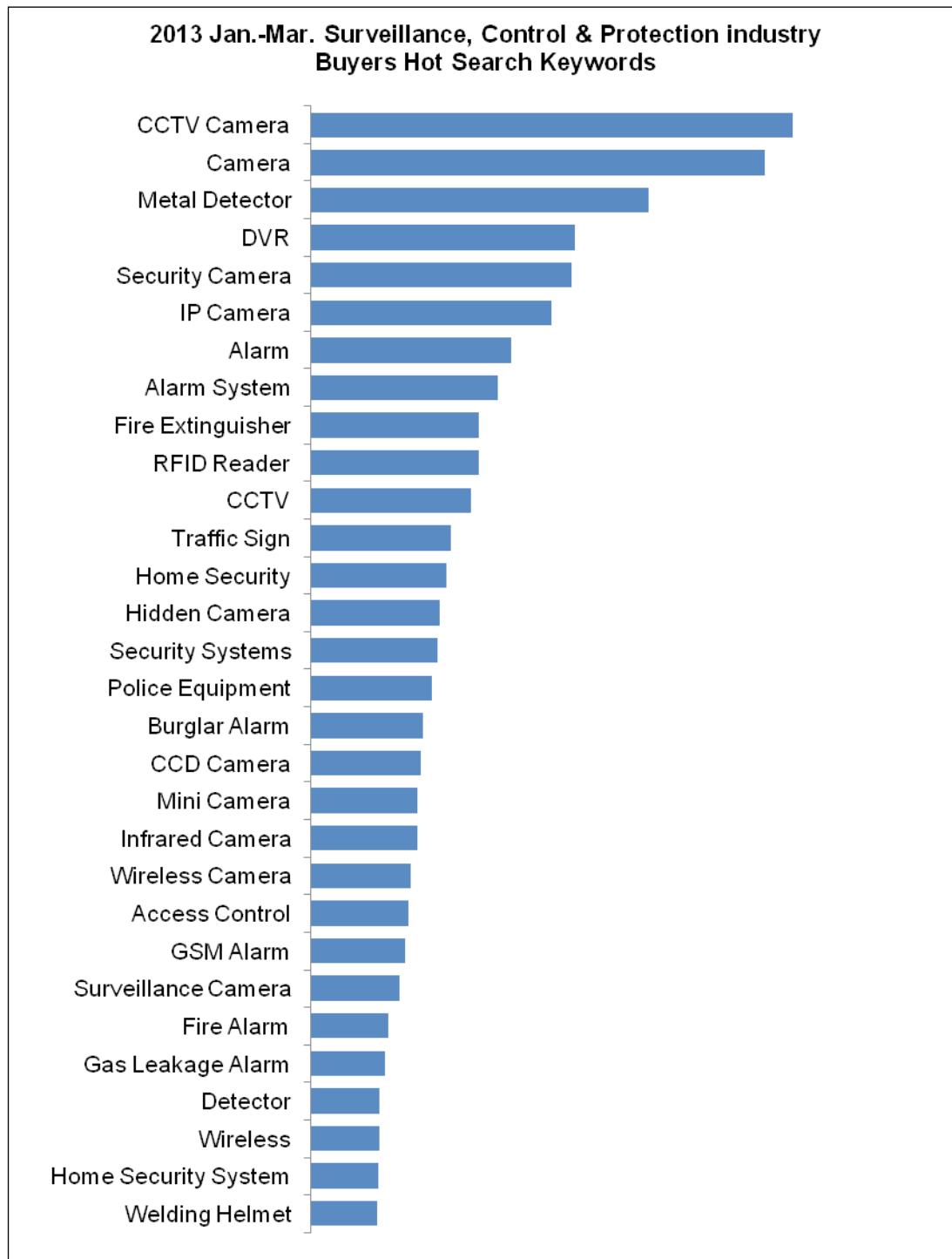
No.	Export Country/Region	Export Amount(One Thousand USD)	Compared to the last year
1	China	12,738,391	10%
2	Japan	9,342,743	10.6%
3	Netherlands	3,876,960	21.2%
4	Thailand	2,292,650	20.4%
5	USA	1,917,490	-10.2%
6	Germany	1,816,830	-13.5%
7	Taiwan Province	1,784,787	38.2%
8	Singapore	1,003,940	10.7%
9	Korea	739,046	8.3%
10	Malaysia	694,558	24.5%
11	Slovakia	604,921	2.5%
12	British	529,701	-5.2%
13	Indonesia	431,890	-38.6%
14	Sweden	391,554	-7.5%
15	Canada	382,912	22.6%
16	Czech Republic	243,777	86.4%
17	France	240,867	8.1%
18	Hungary	205,565	-8.4%
19	Mexico	191,119	26.3%
20	Poland	183,401	28.7%

2012 January-December, twenty surveillance cameras exporting countries / regions above, China ranked the first, with exports of \$ 12.74 billion USD (increase by 10%), Japan and the Netherlands were ranked the second, the third respectively, exports were \$ 9.34 billion USD (increase by 10.6%), \$ 3.88 billion (increase by 21.2%). the most significant growth of the country is Czech Republic, with an increase of 86.4%. More significant decline was Indonesia, decrease by 38.6 percent compared to the last year.

(Source : UN COMTRADE)

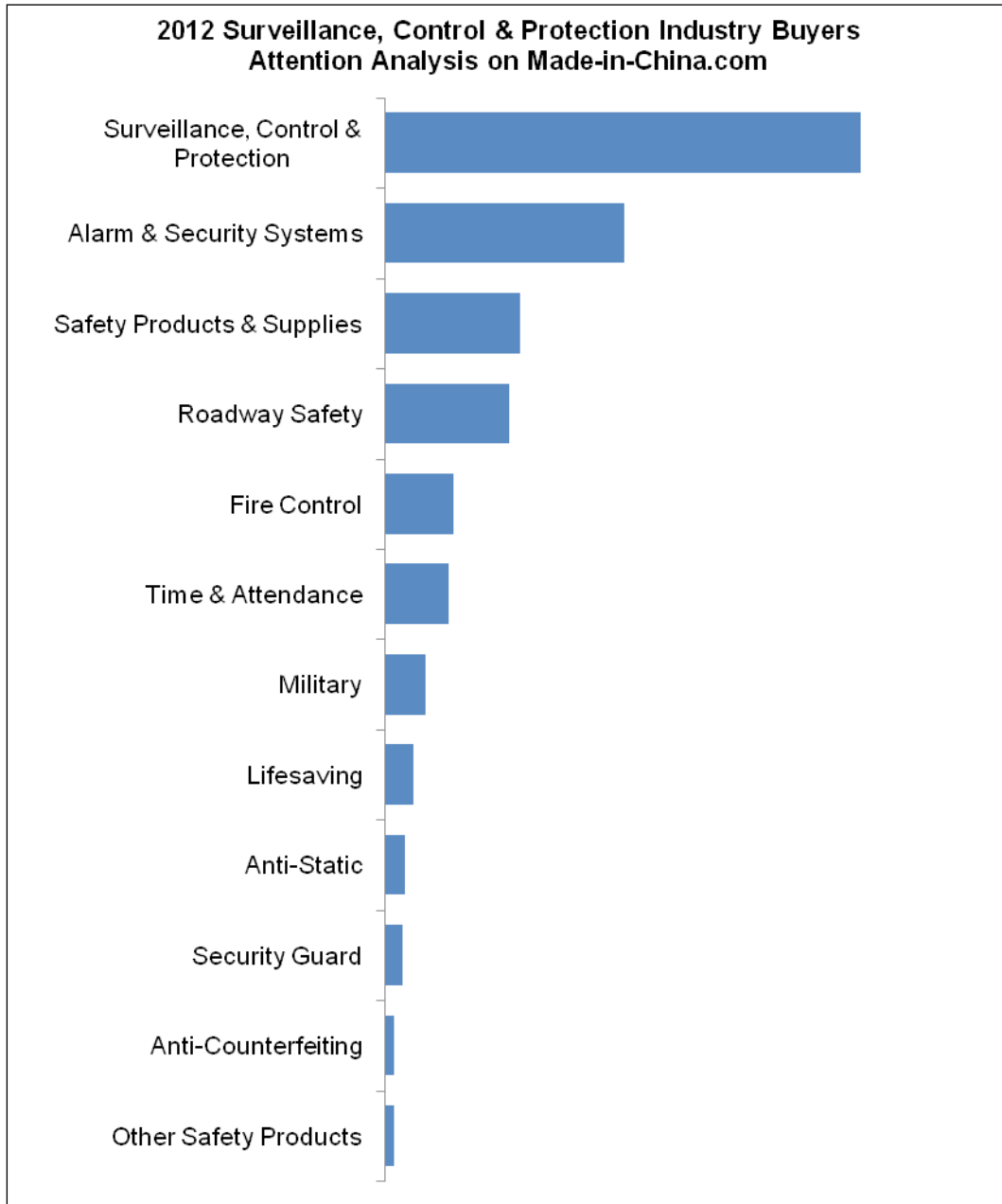
## 4. Surveillance / Control & Protection Industry Data Analysis on Made-in-China.com

### 4.1. 2013 Jan.-Mar. Surveillance, Control & Protection industry Buyers Hot Search Keywords





## 4.2. 2012 Surveillance, Control & Protection Industry Buyers Attention Analysis on Made-in-China.com

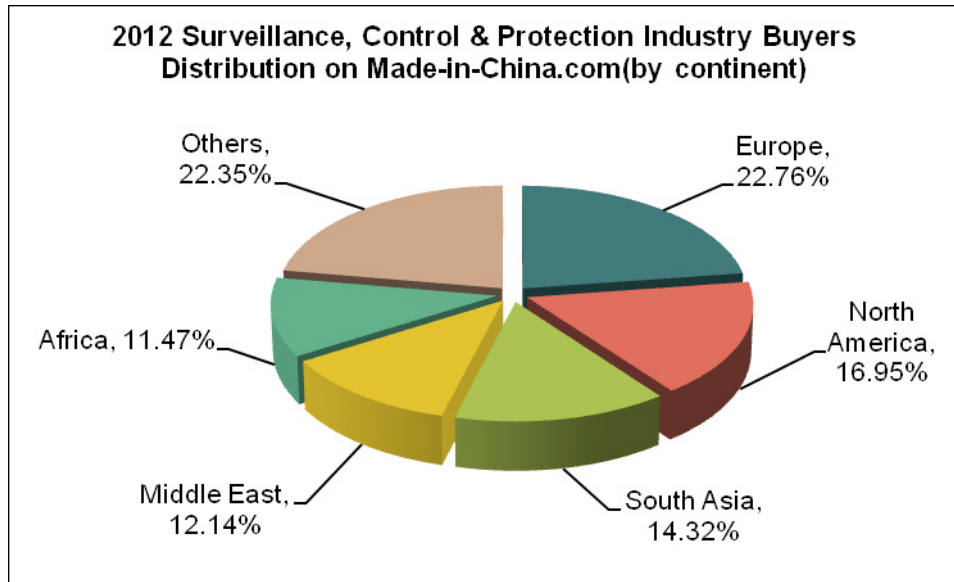


According to the 2012 data from Made-in-China.com, the buyers from Safe & Protection industry show the great attention in surveillance and protection devices. Which is much high than the second place of the electronic alarm safety device.

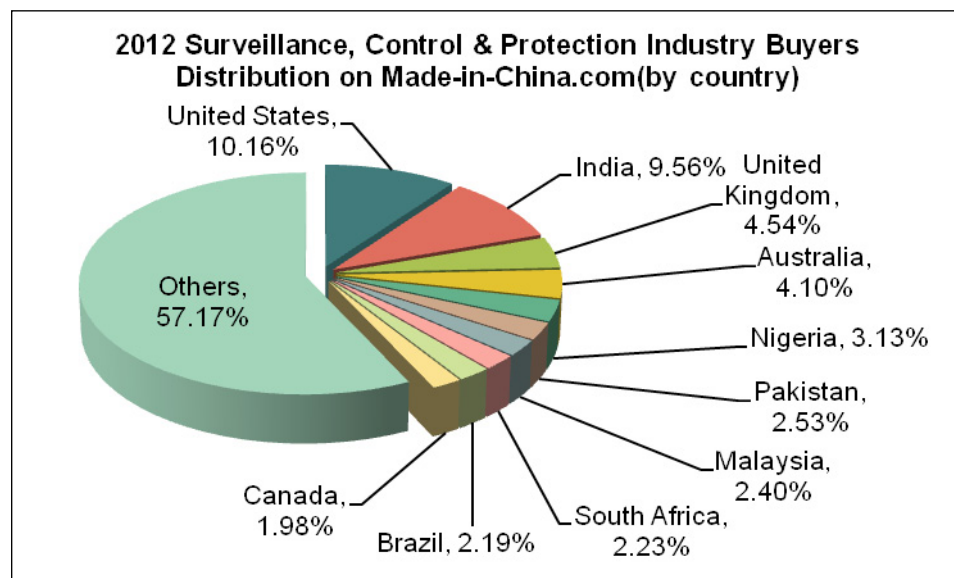
## 4.3. 2012 Surveillance, Control & Protection industry buyers distribution (by inquiry) on Made-in-China.com

The following statistics Date: 2012 1 to 12 months.

Statistics by continent:



Statistics by country:



(Source: Made-in-China.Com)

The IAR Team of Made-in-China.com dedicates to surveying,excavating and collating industry information for supplying the service of timely and exact information analysis, providing necessary information and dates for clients'decision.

Thanks for reading the report, if you have any questions,opinions or advices, please contact us.

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