INTELLIGENT CONTROLS IN BUILDINGS
ENVIRONMENTAL CONTROL SYSTEMS
THE CHINESE MARKET 2008-2013

BSRIA PROPLAN

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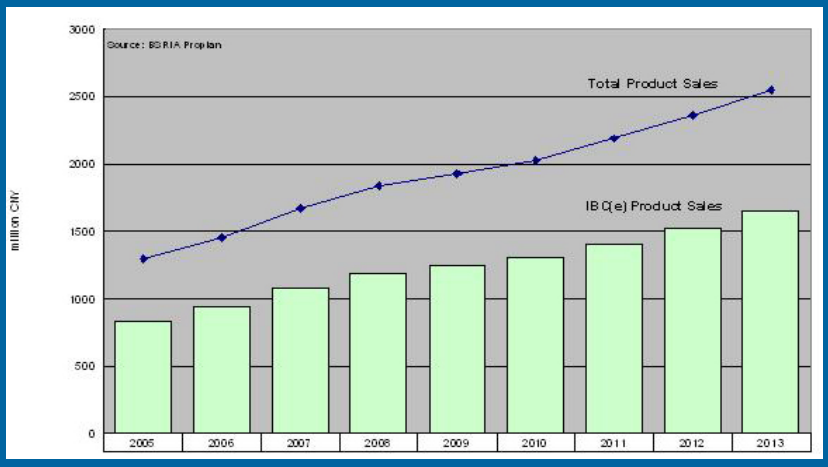

Figure 1. Demand for IBC(e) Product in China 2005-2013

This report will help you to:

- Identify market opportunities
- Understand market trends
- Keep up to date with market developments, the players and routes to market
- Develop sales, marketing and distribution strategies
- Stay ahead of the competition

Introduction

This study is part of a series of multi-client reports on the world's market for intelligent controls in non-domestic buildings. "The Chinese Market 2008 to 2013" is our fourth edition for Intelligent Controls in Buildings, based on data from no less than 75% of the IBC(e) manufacturers business in China, is the most detailed and accurate report published on this subject. Support from all the major manufacturers and suppliers over the last 25 years has enabled us to develop a series of robust models that takes account of inputs from all distribution channels and trends, numerous market segmentations plus product and system cost structure over the last decade.

This report of nearly 200 pages benefits from comparisons with our similar studies carried out in different regions of the world and related technical infrastructures in buildings. Data on the past present and future market for IBC(e) is clearly presented in both quantitative and qualitative terms, so that strategies can be developed to fully exploit opportunities on a pan-European basis.

Study Overview

Over the last three years the Chinese market has shown significant growth of 12.6% per annum for sales of IBC(e) product and IBC(e) systems. A strong economy and new building construction output remained the main demand drivers accounting for almost 90% of IBC(e) system sales. Cities such as Beijing, Shanghai and Nanjing received a major boost from the 2008 Olympics; strong foreign direct investment during this period also helped contributed to the growth of the IBC(e) systems market. Many multinational companies have expanded their business in China by setting up new manufacturing and operating facilities, especially in the electronic manufacturing, retail and pharmaceutical industries.

In 2008 the total IBC(e) Systems market was valued at RMB3.014 billion, with manufacturers contributing 45% representing an increase of five per cent from 2006.

The increasing concern over energy conservation will have a lasting positive effect on IBC(e) sales; leading to increased awareness that a properly specified BAS, with properly executed monitoring and control strategies can help to save energy consumption. A promising future is predicted for the Chinese IBC(e) market with many provincial governments having made concrete plans for huge investment in infrastructure construction and intensive policies for the upgrading of their infrastructures to increase energy saving in the main cities.

This study shows that Controls Contractors/Installers have now established a firm base and their influence is growing; however, foreign owned IBC(e) manufacturers are now able to offer the full solution package in China and thereby install systems directly.

Web-enabled open standard protocol products have become the biggest application accounting for 48%. Of all the protocols used today, open standard web enabled accounted for 25.3% of the total product. BSRIA estimated the automation controller market to be RMB126 million. For the field controller market, the total sales volume reached 213,299 units in 2008.

Unsurprisingly, in 2008 offices took the largest share of the commercial business with 16.4%; followed by hotels/catering, retail and government.

The geographic distribution of IBC(e) systems continues to be concentrated in the East of the country such as Shanghai, Zhejiang and Jiangsu provinces. The North accounted for the second largest market (Beijing, Tianjin and Shandong). It is expected that the Western market will begin to experience a healthy growth in the next 5 to 10 years. Recently provinces in mid and western China such as Chongqing and Hebei released a mid-term plan for the key cities' infrastructure upgrading, which will have a knock on positive effect for the IBC(e) market.

BSRIA Worldwide Market Intelligence

BSRIA Proplan is a specialist consultancy that focuses on analysing the market for intelligent controls in buildings. Our studies are built upon their valuable data which major suppliers have entrusted to us, as well as information gathered in face-to-face interviews with end users and other players in the supply chain. Our integrity and honesty have given us this privileged and unique position - to deliver insightful analysis based on accurate quantitative data.

For further details of this or any other WMI study please contact Tim Page at BSRIA:

Phone: +44 (0)1344 465629
Fax: +44 (0)1344 465626
Email: *tim.page@bsria.co.uk*
Website: www.bsria.co.uk/wmi

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Review

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- The sales by Product (factory gate prices) and Systems (installed) for direct and indirect channels, to 2008, with forecast to 2013
- The level of penetration of system sales in each country and how this compares with other developing and developed markets
- The market size by type of project, new construction, refurbishment and retrofit
- The market size by contract value (4 segments)
- The market size by single, multiple & multi-site projects
- The market size by type of hardware (8 products)
- The market size by type/end use of building (16 categories)
- The distribution channels and the volume of business that they handle, comparing "product" and "total solution sales"
- Market share bands for all established suppliers by IBC(e) product and by total system sales
- Profiles of established suppliers provided in a standard format allowing comparisons to be made
- Establishes the part played by all third party suppliers and the impact that they will have in the future
- A detailed analysis of the channels of distribution and emerging trends
- Assess the IBC(e) suppliers' influence on Total Building Solutions and measures the incidence of integrated services by both functionality and the vertical building markets in which they are installed
- Reviews the impact of Technology and IT-Convergence on IBC(e) business

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Reports are available to buy in full *or separately* for products business or for systems business on an individual country basis. For prices and t purchase this study please contact Tim Page: +44 (0)1344 465629.