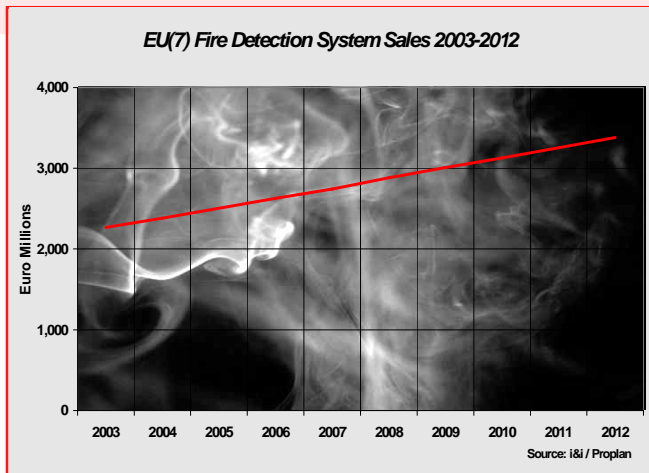
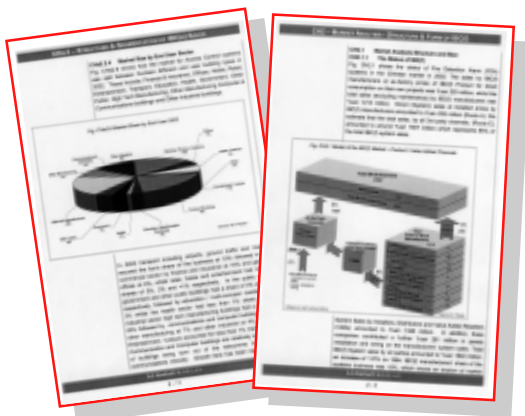


## ESSENTIAL READING FOR PLANNING YOUR MARKET STRATEGY



### INTRODUCTION

This study is part of a series of multi-client reports on the world's market for intelligent controls in non-residential buildings. Support from all the major manufacturers and suppliers over the last 25 years has enabled us to develop a series of robust models that when populated with validated data, can determine the performance and value of both the supply and demand side. It has allowed us to size, compare and trend numerous market segmentations, establish supplier performance in both product and systems business and establish the importance and effect of all the demand drivers. This is our third study of the EU(7)<sup>1</sup> market for IBC(f)<sup>2</sup> and it represents the most detailed and accurate report published to date on this subject for this region. This 712 page report benefits from comparisons with similar studies carried out in different regions of the world and related technical infrastructures in buildings. Split into two volumes, volume I comprises the executive summary, comparing findings such as supplier shares and market segmentations across the EU(7), whilst volume II provides the detailed analyses using the same format for each of the seven countries. Data on the past, present and future market for IBC(f) is clearly presented in both quantitative and qualitative terms, so that strategies can be developed to fully exploit opportunities on a pan-regional basis.



### APPRECIATION

This study on the EU(7) market for fire detection and safety systems shows that it has become largest "single" market in the world, having overtaken the North American market since 2003. Penetration in some countries represents some of the highest anywhere in the world, yet this study shows that each country exhibits good potential for further growth, particularly through higher levels of maintenance and also through increased penetration. The EU(7) market for IBC(f) Systems in 2007 was worth €2744 million, and of this, third party channels delivered 64%. Whilst construction output has improved over the last 5 years from the stagnant condition it found itself in after the turn of the new millennium, its growth has been far outstripped by that of the IBC(f) market, which has grown at an average compound rate of 5%, and at an even higher rate once maintenance is included.

This study identifies which other factors have been at play, not least the enhancement and enforcement of standards and regulations, including the move to self regulation and an increasing awareness about all aspects of fire detection. These have been of key importance in driving not only refurbishment and replacement, but in particular, the maintenance business. However, continued pressure on prices continues to dampen product sales. Nevertheless, this study shows that innovative suppliers are finding ways to address this through the development of new technologies and exploitation of various third party routes to market.

The reader will gain valuable insight into just how far analogue addressable systems have now penetrated the business, as well as the impact that multiple sensing technology, early warning aspirating smoke detection systems, voice evacuation and wireless technology are now having on the business. The report also provides a snapshot of the present level of systems integration in 18 different building types and shows that there remains plenty of opportunity to develop fire solutions that are integrated not only with other safety systems, but with other building technical infrastructures and converged with IT systems.

There has been consolidation in recent years and although just five global companies now take well over half the business, none is sufficiently large to dominate, but smaller national players are struggling to remain competitive. So with high barriers to new entrants, above average growth rates and healthy margins, this remains a very attractive business to be in.

This study is now available online through our  
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<sup>1</sup> EU(7): Belgium, France, Germany, Italy, Netherlands, Spain, UK

<sup>2</sup> IBC(f): Intelligent Building Controls - Fire Detection and Alarm Systems:  
- All control & instrumentation panels, supervisory computers & software, networks, detectors, sounders and call points for both wired and wireless systems. Voice Evacuation Systems, Advanced Fixed Fire Extinguishing Systems and the integration of other building services with IBC(f) are each reviewed separately



## REVIEW

Comprising some 712 pages and some 275 charts and tables this report identifies, analyses and compares with the past, separately for Belgium, France, Germany, Italy, Netherlands, Spain and the UK:-

- The sales by Product (factory gate prices) and Systems (installed) for direct and indirect channels, to 2007, with forecasts to 2012
- The market size by commercial, public, industrial
- The market size by new construction, refurbishment and replacement
- The market size by 4 different contract values
- The market size by 5 types of hardware, conventional/analogue addressable, and 14 detector types
- The market size by 18 building types/end uses
- The market size by voice evacuation, advanced extinguishing control, and wireless systems
- The geographic distribution of sales
- The penetration of system sales
- 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(f) product and by total system sales
- Profiles of established suppliers provided in a standard format allowing comparisons to be made
- 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
- The IBC(f) suppliers' influence on Total Building Solutions and the incidence of integrated services by both functionality and the vertical building markets in which they are installed
- The impact of Technology and IT-Convergence on the IBC(f) business

For prices and to purchase this study please see the order form that accompanies this synopsis

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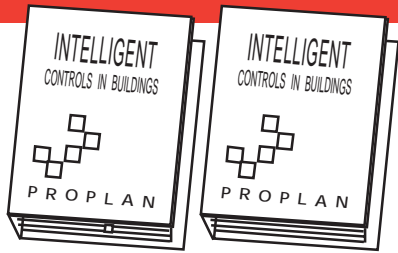

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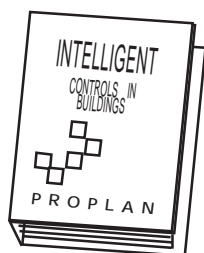




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