INTELLIGENT CONTROLS IN BUILDINGS
ENVIRONMENTAL CONTROL SYSTEMS
THE EUROPEAN MARKET 2007-2012

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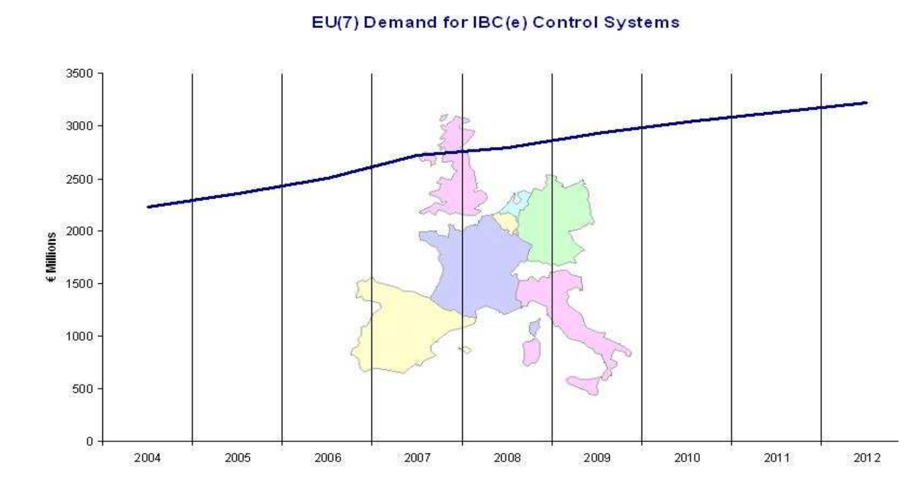

This report will help you to:

- **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 (IBC(e)). "The European Market 2007 to 2012" is our tenth edition on the environmental control systems business, and based on data from manufacturers representing more than 80% of sales to the market, 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 more than 1000 pages benefits from comparisons with our similar studies carried out in different regions of the world and related technical infrastructures in buildings. It is split into two volumes, where volume I comprises the executive summary, comparing findings such as supplier shares and market segmentations across all countries, and volume II provides the detailed analyses using the same format for each of the EU(7) countries. 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

Countries analysed in the study include *Belgium, France, Germany, Italy, the Netherlands, Spain and UK.*

The EU(7) market has over the last three years shown a significant growth for IBC(e) system sales of nearly 7.0% per annum although only a modest annual growth in IBC(e) product sales of 0.5%. The total IBC(e) systems market in 2007 was worth €2.723 billion and of this IBC(e) manufactures contributed 47.5%, or €1.294 billion in direct sales.

Although Belgium sales of Total IBC(e) Systems increased 24% from 2004, it continues to be the smallest market in the EU(7). In France, Refurbishment has been the main contributor to IBC(e) sales in recent years and accounted for the lion's share in 2007. Germany remains by far the largest single market in the EU(7), with system sales up 9% from 2004 to €1104 million, demonstrating an increase in the proportion of value added through more sophisticated, integrated solutions.

The Italian IBC(e) market is the 4th largest market in the EU(7) and has grown in spite of stagnant or declining construction, although renovation, has seen mild growth in the last 2 years. For the Netherlands, Total IBC(e) System sales have increased by around 20% from 2004. It is the 5th largest market in the EU(7). Spain is the 2nd smallest market in the EU(7) and penetration of advanced controls remains the lowest among the seven countries although it has risen since 2004 from €2.9 to €3.6 per capita.

Total UK IBC(e) System sales performed extremely well increasing by 50% from 2004 to £428 million, pushing penetration from €7.0 per capita in 2004 to €10.3 in €2007

In a very short space of time, energy has become the top driver of the building controls market, initiated by the need to reduce CO_2 emissions to combat global warming. European governments are at different stages in introducing the legal frame work and portfolio of regulations to meet these demands, however some already have impressive energy and climate programmes which will have a very positive effect on IBC(e) sales.

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:

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Review

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- Penetration of system sales in each country in western Europe
- The market size by type of project; new construction, refurbishment, retrofit and demand to 2012
- The market size by contract value (4 segments)
- The market size by type single, multiple & multi-site projects
- The market size by type of hardware (10 products)
- Geographic distribution of sales in all 7 countries
- The distribution channels and the volume of business they handle, comparing "product" and "system sales"
- Market shares for all established suppliers by sales of IBC(e) product, total product, total IBC(e) systems, IBC(e) maintenance and total IBC(e) turnover
- Share of controllers by communication protocol used, BACnet, Lon, Mod-BUS, KNX/EIB, etc. & by web-enabled capability
- Profiles of established suppliers provided in a standard format allowing comparisons to be made
- An analysis of the major demand forces & buying motives
- A detailed analysis of the channels of distribution, emerging trends, changes in contractual procedures and the impact that they are having on the business
- Assesses the IBC(e) suppliers' influence on the integrated building solutions business, measuring the incidence of integration in thirteen different building types
- The sales by product (1st point of distribution prices) and systems (installed prices) for direct and indirect channels

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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 to purchase this study please contact Tim Page: +44 (0)1344 465629.