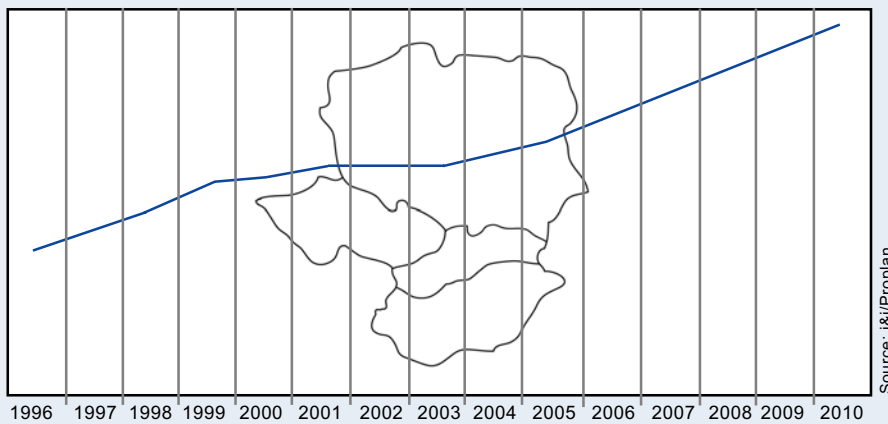


EVALUATING THE MARKETS IN:

EU-CE(4) – Demand for IBC(e)



- CZECH REPUBLIC
- HUNGARY
- POLAND
- SLOVAKIA

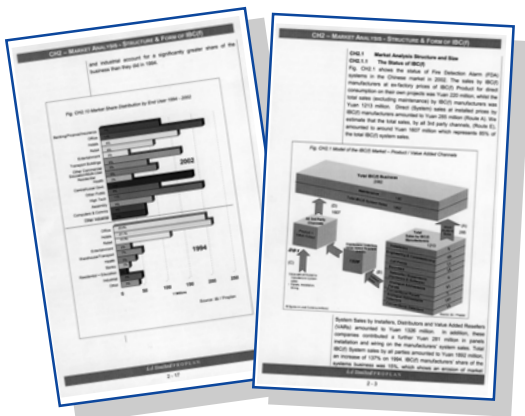
INTRODUCTION

This study is part of a series of multi-client reports on the world's market for intelligent controls in non-domestic 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 determine the importance and effect of all the demand drivers. "Environmental Control Systems (IBC(e)¹) - The Central European Market 2005 to 2010" is the most detailed and accurate report published on this subject for this region. This 410 page report benefits from comparisons with 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-CE(4)² 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-regional basis.

APPRECIATION

This study shows that whilst the market in Central Europe for environmental controls in buildings has disappointed over the last five years it is one of the least developed and potentially fastest growing market in the world. The EU - CE(4) market during the last five years achieved a compound annual growth rate of 3.4% less than half that realised in the previous 5 years. This is indeed sluggish growth for such an under developed market that has penetration levels of one third the average of western Europe. This market is still very dependant upon new construction output in the building sector and this fell away in the first half of this decade particularly in Poland the largest market. Despite these poor trading conditions demand grew thanks to the installation of more sophisticated systems, extensive refurbishment programmes in the district heating market and suppliers extending their involvement in delivering total building solutions and developing stronger distribution channels. We forecast that the market will grow from €117 million in 2005 to €170 million in 2010 an annualised growth rate of 8.5%. Whilst this rapidly developing market lacks robustness and is heavily dependant upon new construction output, particularly in the commercial sector, retrofit business will shortly lift off by the need to comply with the EU Energy Performance Building Directive (EPBD). In all sectors higher specifications and convergence on the conventional controls market are increasing the penetration of ddc controls. All the world's major suppliers of environmental control products are well established across most of the four countries and some 5 manufacturer suppliers account for 80% of product sales. However in the systems market manufacturers account for only 50% of the business as third party routes to market have increased their share of the business.

Intelligent Controls in Buildings



¹ IBC(e): Intelligent Building Controls - Environmental Controls: - Computerised / microprocessor products and systems that control/monitor environmental plant such as heating, ventilation, air conditioning in non-domestic buildings, comprising a central user interface, communications network and data acquisition/direct digital controllers (DDC)

² EU-CE(4): The countries of Czech Republic / Hungary / Poland / Slovakia.

This study is now available online through our
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and jeremy.towler@iandi.ltd.uk

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REVIEW

Comprising some 410 pages and 200 charts and tables this report identifies and analyses:-

- The sales by Product (factory gate prices) and Systems (installed) for direct and indirect channels, to 2005, with forecast to 2010
- The level of penetration of system sales in each country and how this compares with western Europe
- 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 geographic distribution of sales within each country
- 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
- An analysis of the part played by all third party suppliers and the impact that they are having on the business.
- A detailed analysis of the channels of distribution and emerging trends
- Assesses the IBC(e) suppliers’ influence on Total Building Solutions and measures the incidence of integrated services by both functionality and the vertical building markets that they are installed in

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

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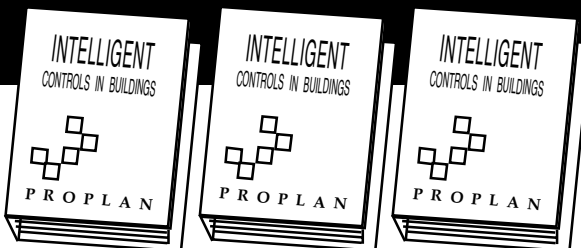
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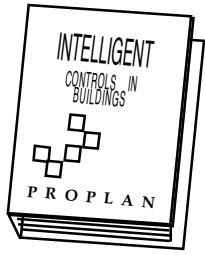
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