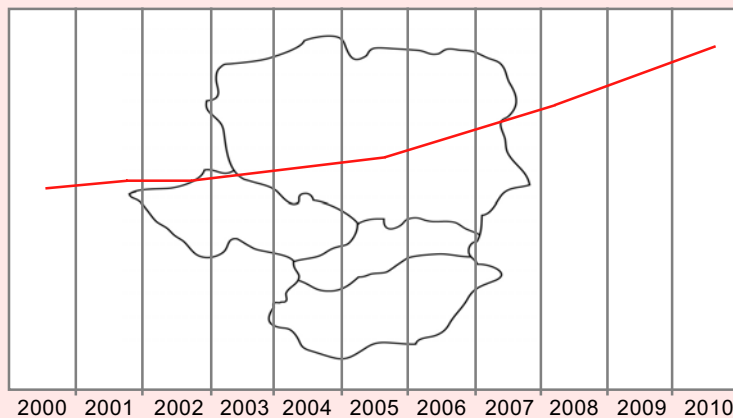


EVALUATING THE MARKETS IN:

EU-CE(4) – Demand for IBC(f)



Source: i&i/Proplan

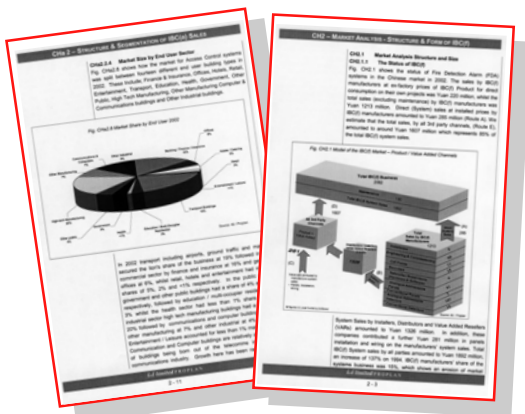
- CZECH REPUBLIC
- HUNGARY
- POLAND
- SLOVAKIA

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 establish the importance and effect of all the demand drivers. "Fire Detection and Safety Systems - IBC(f)¹ - The Central European Market 2005 to 2010" is the most detailed and accurate report published on this subject for this region. This 400 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(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

The Fire Detection and Safety Systems market in the EU - CE(4) has grown slowly but consistently over the last five years and was worth €108 at installed prices in 2005. Whilst currently it lacks dynamic growth this is compensated by its robustness and stability for standards and regulations have kept at bay cheap products from the Far East. Nevertheless demand disappointed for it only realised a compound annual growth rate of 2.7% over the last five years which indeed is sluggish for such an under developed market that has penetration levels of only one third the average of western Europe. Demand is still 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 a well developed refurbishment and retrofit market accounting for 35% of the systems business and the installation of more sophisticated systems. Suppliers extended their involvement in delivering total safety solutions with voice evacuation making a strong entrance into the Polish market and building up stronger distribution channels. We forecast that the market will grow to €160 million in 2010, an annualised growth rate of 8.1%. This rapidly developing market will be driven by an expanding new construction market more vigorous implementation of regulations and codes of practise in order to meet EU regulations and a shift to more expensive and sophisticated systems. All the world's major suppliers of fire detection products and systems are well established across most of the four countries and some 5 manufacturer suppliers account for 77% of product sales. However in the systems market manufacturers account for only 30% of the business as third party routes to market have consistently increased their share over time.



¹ IBC(f): Intelligent Building Controls - Fire Detection and Alarm: - All control & instrumentation (panels & supervisory computers), networks, supervisors, detectors, sounders and call points for both wired and wireless systems. We have reviewed separately, Voice Evacuation Systems and Advanced Fixed Fire Extinguishing Systems and the integration of other building services with IBC(f)

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

This study is now available online through our
OBIS SERVICE. For more details see

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and jeremy.towler@iandi.ltd.uk

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Intelligent Controls in Buildings



FIRE DETECTION AND SAFETY SYSTEMS THE CENTRAL EUROPEAN MARKET 2005-2010

REVIEW

Comprising some 400 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 type of hardware (8 products) & 11 detector types
- The market size by type/end use of building (16 categories)
- Geographic distribution of sales within each country
- The market size by voice evacuation, advanced extinguishing control, and wireless system
- 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
- Analysis of the major forces that determine demand and their future impact
- 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
- Assesses the IBC(f) 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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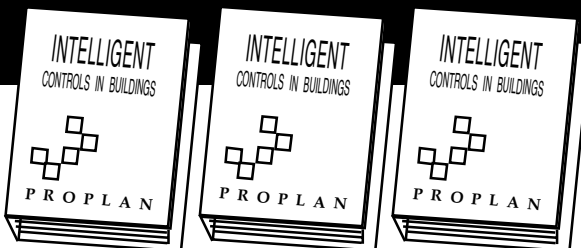
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INTELLIGENT CONTROLS IN BUILDINGS

THE CENTRAL EUROPEAN MARKET 2005-2010

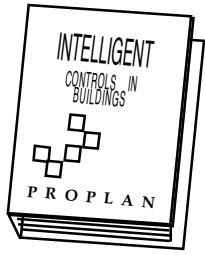
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THE CENTRAL EUROPEAN MARKET 2005-2010



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