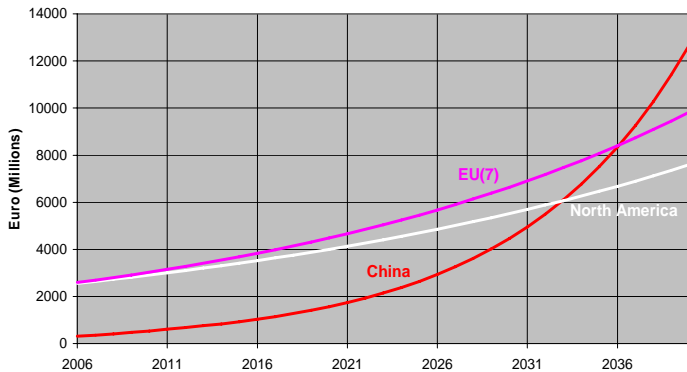




EVALUATING THE MARKETS IN CHINA & HONG KONG

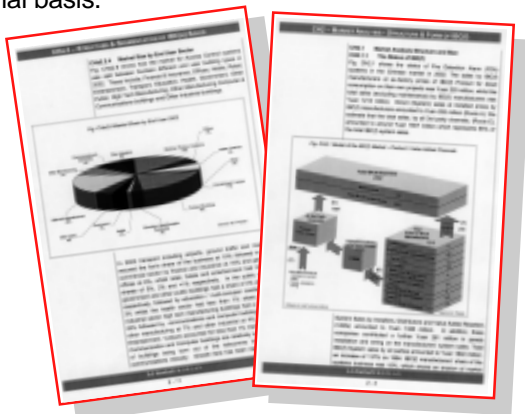
China / North America / EU(7) Fire Detection/Alarm System Sales



*EU(7) comprises Belgium, France, Germany, Italy, Netherlands, Spain, United Kingdom. Source: i&i limited / Proplan

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 China Market 2006 to 2011" is the most detailed and accurate report published on this subject for this region. This 270 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 both China and Hong Kong, and volume II provides the detailed analyses using the same format for both China, Hong Kong / Macau. 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.



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)

APPRECIATION

This study on the China market for fire detection and safety systems forecasts that it will become the largest market in the world when it overtakes the North American market in 2033, but even then penetration will still only be some 25% of that recorded in developed western markets. The China market has grown at an average compound rate of 15% over the last four years. The total fire detection systems market in 2006 was worth CNY3,141 million, and of this third party channels delivered 71%. The total system sales market is approximately 45% of the size of the UK whilst the value of construction is currently running at 45% higher, dependent upon which set of official statistics you benchmark against. Just based on one demand driver, new building construction, the penetration of fire detection should be treble, based on similar prices. However, the penetration of fire detection systems in China based on sales per capita is a little less than one fiftieth of the UK and therefore there is enormous potential for growth. But this will only be achieved if political stability remains and the codes of practise and standards are fully implemented and updated to meet the need for reducing risk and increasing safety. The last fifteen years have seen enormous progress on these points and there is no reason to doubt that this will not continue.

Over the last eight years the share of imported products has declined as they have progressively been driven out of main stream business. Foreign owned fire detection manufacturers have also set up production in China for the local market and some have formed alliances and invested in Chinese companies. As a result, foreign owned companies have regained some of their market share lost over the last eight years and have a much stronger base from which to grow, but the quality of locally manufactured products improves and their production expands.

So despite a rapid and consistent growth over the last eight years, the forces that determine profitability and attractiveness have conspired to make it a difficult market to operate. Some suppliers have grasped the nettle and have implemented new strategies to combat the change through forming alliances and investing in Chinese companies. This report shows that this strategy is not just built on getting a share of the China market but has much wider implications in developing a coherent world strategy.

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

www.iandi.ltd.uk

or contact allan.mchale@iandi.ltd.uk
and jeremy.towler@iandi.ltd.uk



REVIEW

Comprising some 270 pages and 100 charts and tables this report identifies and analyses separately for P.R. China and Hong Kong / Macau:-

- The sales by Product (factory gate prices) and Systems (installed) for direct and indirect channels, to 2006, with forecast to 2011
- 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)
- 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
- 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
- Reviews 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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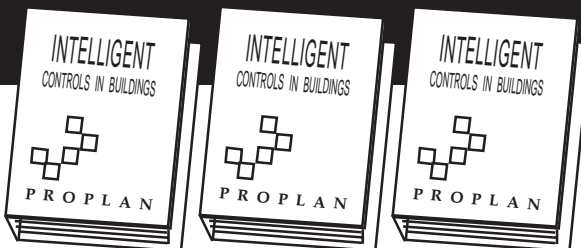


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INTELLIGENT CONTROLS IN BUILDINGS THE CHINA MARKET 2006-2011

Intelligent Controls in Buildings

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