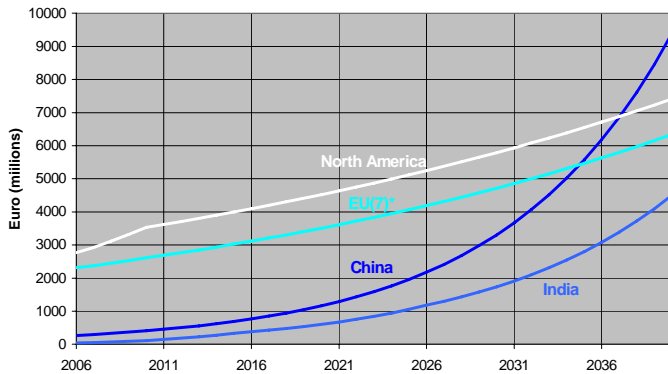




EVALUATING THE MARKETS IN INDIA

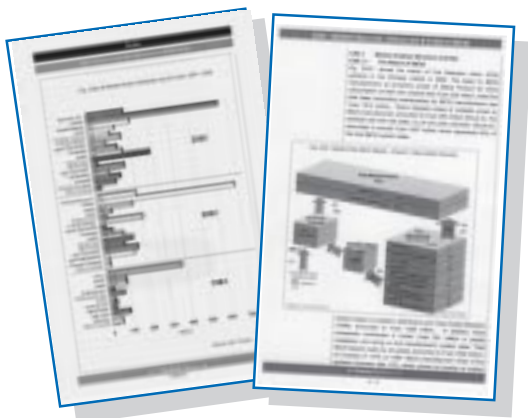
India / China / North America / EU(7) IBC(e) System Sales Forecast



*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 determine the importance and effect of all the demand drivers. "Environmental Control Systems (IBC(e)¹) - The India Market 2007 to 2012" is the most detailed and accurate report published on this subject in this region. This 230 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 which summarises the findings and compares India with other regions of the world, whilst volume II provides the detailed quantitative and qualitative analysis, historical development and future forecast, so that strategies can be developed to fully exploit opportunities.



APPRECIATION

This study shows that India is the fastest growing, least developed and potentially one of the largest markets for IBC(e) in the world. It focuses on the part played by manufacturers of DDC controls and value added resellers in the business of environmental controls systems and the wider picture of building services controls. The total IBC(e) systems market in 2007 was worth INR2,919 million and of this, manufacturers contributed INR2,520 million of product and systems sales. Sales are being driven by unprecedented growth in new construction output which currently stands at about 30% per annum in the commercial sector. The Indian market for IBC(e) Systems is made up of two components. The largest at this time is the sale of IBMS² projects where the IBC(e) content accounts for around 47% of the business. The second is the supply of independent IBC(e) solutions and here manufacturer systems suppliers accounted for more than half of the installed business.

In 2007 virtually all DDC product was imported into India from approximately 10 international IBC(e) manufacturers. There is some local manufacturing of field equipment and the unstructured market does import small quantities of field product but at this time it is not particularly significant and neither has yet made an impact on this market. Strong demand has not yet reduced competitive pressures, but compared with other building technical infrastructure businesses, where local manufacturers play a more important role, there is more opportunity to sell on quality and life cycle costing. However, the majority of suppliers are too eager to win the business even if it means lowering the price or specification.

There is an enormous difference in the sales penetration of DDC controls between India and Western Europe and although construction output per capita and GDP per capita are each correspondingly far behind that of Western Europe, the report shows that India has enormous potential for further growth through greatly increased penetration. Measured by total systems sales per capita, it has more than doubled in the last eight years and we expect this rate of growth will be sustained for many years to come.

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

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 IBMS: Integrated Building Management Systems

ENVIRONMENTAL CONTROL SYSTEMS THE INDIA MARKET 2007-2012

REVIEW

Comprising some 230 pages and more than 50 charts and tables this report identifies and analyses:-

- The sales by Product (factory gate prices) and Systems (installed) for direct and indirect channels, to 2007, with forecast to 2012
- The level of penetration of system sales and how this compares with other developing and developed markets
- The market size by new construction, refurbishment and retrofit
- The market size by commercial, public, industrial
- The market size by single, multiple & multi-site projects
- The market size by 4 different contract values
- The market size by 5 types of hardware
- The market size by 16 building types/end uses
- The size, segmentation, growth and suppliers to the business of Integrated Building Management Systems (IBMS)
- The geographic distribution of 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(e) 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
- The channels of distribution and emerging trends
- The IBC(e) 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(e) business

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

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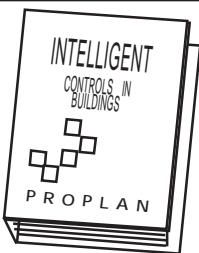
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