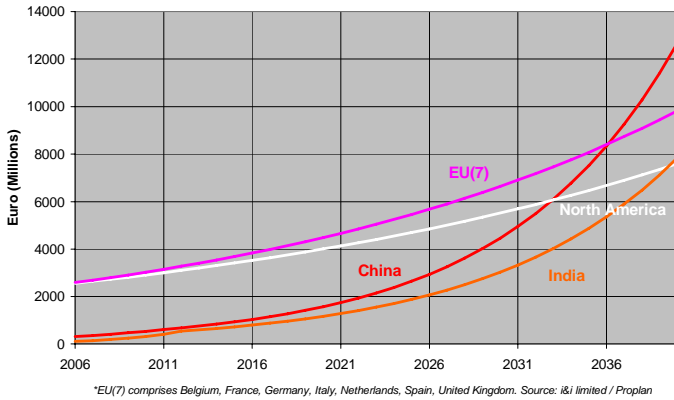




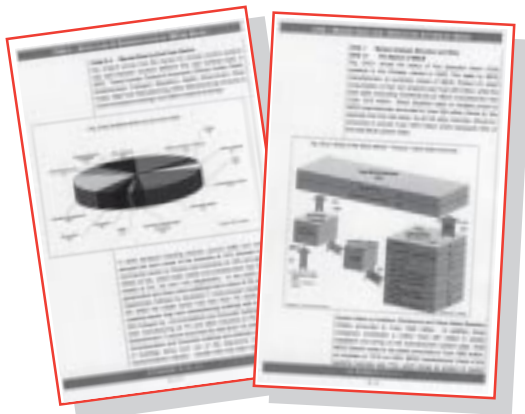
## EVALUATING THE MARKETS IN INDIA

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



### 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)<sup>1</sup> - The India Market 2007 to 2012" is the most detailed and accurate report published on this subject for this region. This 220 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 the Indian market for Fire Detection and Safety Systems has grown at an average compound rate of 30% over the last three years, higher than any other significant sized market in the world, and is set to overtake the North American market by about 2040.

The study focuses on the part played by manufacturers and installers of Fire Detection systems and the wider picture of building services controls. It provides a detailed quantitative and qualitative assessment of the current and future markets for IBC(f) systems in non-residential buildings in India.

This study shows that the total IBC(f) systems market in 2007 was worth INR8,265 million and of this IBC(f) manufactures contributed INR6,214 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. This is driving sales, together with rising levels of fire standards and regulations albeit with much weaker influence.

In 2007 the vast majority of fire detection equipment was imported into India, with the majority from approximately 10 international IBC(f) manufacturers. Some sensors and panels are manufactured locally and it is surprising that it does not account for more, considering that import tax can be as high as 35%.

The total installed system sales market is approximately 20% of the size of the United Kingdom market. Just based on one demand driver, new building construction, the sales penetration of fire detection should be five times higher, based on similar prices. This study shows that the penetration of fire detection systems in India is not only well behind the western world, it is also lagging behind that of China. Whilst regulations and codes of practise are in place they are not rigorously enforced and when they are, the strong preference of most buyers is to install conventional unsophisticated systems. This is proving both a challenge and an opportunity to suppliers of state-of-the-art addressable systems.

But despite its position relative to other world markets, there is simply no other country in the world that offers the same kind of prospects, even China, and not surprisingly therefore, all the world's major players are now actively engaged in establishing a position in the market.

This study is now available online through our  
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<sup>1</sup> 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)



# FIRE DETECTION AND SAFETY SYSTEMS THE INDIA MARKET 2007-2012

## REVIEW

Comprising some 220 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 /retrofit, replacement
- The market size by commercial, public, industrial
- The market size by 4 different contract values
- The market size by 5 types of hardware, conventional/analogue addressable, and 10 detector types
- The market size by 16 building types/end uses
- The size, segmentation, growth and suppliers to the separate business of Integrated Building Management Systems (IBMS)
- The geographic distribution of sales
- The market size by voice evacuation, advanced extinguishing control, and wireless systems
- 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
- 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 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

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

## CONTENTS

### VOLUME I - EXECUTIVE SUMMARY

1	INDIA OVERVIEW	4
2	WORLD PERSPECTIVE	7
3	MARKET ANALYSIS	9
4	MARKET STRUCTURE - SUPPLY SIDE	17
5	IBMS (INTEGRATED BUILDING MANAGEMENT SYSTEMS)	20
6	INTEGR. OF TECH. SERVICES & BUSINESS ENTERPRISE	22
7	MARKET DYNAMICS & STRATEGIC OPPORTUNITIES	25
8	COMPARISON WITH CHINA & OTHER BRIC'S	27

### VOLUME II - REPORT & ANALYSIS

1	INTRODUCTION	
	PART I - MARKET ANALYSIS - SUPPLY SIDE	
2	STRUCTURE & SEGMENTATION OF IBC(f) SALES	2.3
2.1	Market Structure and Form	2.5
2.1.1	The Status of IBC(f)	2.5
2.1.2	A FiveYear Performance Review	2.7
2.1.3	Market Size by Sector by Type of Hardware	2.8
2.1.4	Market Size by Sector by Type of Detector	2.10
2.1.5	Market Size - Voice Evacuation Systems	2.11
2.1.6	Market Size - Advanced Fire Extinguishing Control Systems	2.11
2.1.7	Market Size - Wireless FDA Systems	2.12
2.2	Market Size by Sector	2.13
2.2.1	New Construction - Refurbishment - Retrofit	2.13
2.2.2	Public - Commercial - Industrial	2.14
2.2.3	Contract Size	2.15
2.2.4	Market Size By End User Sector	2.16
2.3	Geographic Distribution of IBC(f) Sales	2.19
3	INTEGRATED BUILDING MANAGEMENT SYSTEMS (IBMS)	3.1
3.1	Market Structure and Form	3.3
3.1.1	The Status of IBMS	3.3
3.1.2	A Ten Year Performance Review	3.4
3.1.3	Market Size by End User Sector	3.6
3.2	Suppliers	3.7
4	SUPPLIER ANALYSIS	4.1
4.1	Supplier Shares	4.3
4.2	Supplier Profiles	4.7
4.3	Third Party Suppliers	4.19
5	IMPORTANCE & FUTURE PROSPECTS OF VERTICAL MARKETS	
5.1	Commercial Buildings	5.1
5.1.1	Retail Malls and Hypermarkets	5.1
5.1.2	Office Complexes	5.2
5.1.3	Hotels Tourism	5.3
5.1.4	Transport	5.5
5.1.5	Upcoming Projects	5.7
5.1.6	Hospitals	5.7
5.1.7	Leisure & Entertainment	5.10
5.2	The Industrial Sector (Industrial Clusters)	5.13
5.2.1	Special Economic Zones (SEZs)	5.13
5.2.2	Role of the State Government in setting up an SEZ	5.14
5.2.3	Government Initiatives	5.15
5.2.4	Upcoming Projects	5.15

6	TRADING PRACTICES AND PROCEDURES	6.1
6.1	Contractual Relationships in the Construction Industry	6.3
6.2	Purchasing Routes for IBC(f)	6.5
6.2.3	Future Trends	6.7
7	BUILDING CONSTRUCTION - STOCK - FUTURE POTENTIAL	7.1
7.1	The Indian Construction Industry	7.1
7.2	Comparison with the Biggest and Best	7.3
7.3	The Shape & Structure of the Indian Construction Industry	7.7
7.4	Commercial Construction	7.9
7.5	The Industrial Sector	7.11
7.5.1	Industrial Clusters	7.11
7.5.2	Global Manufacturing Hub	7.12
7.6	Urban Regeneration	7.15
7.7	"Green Building" Initiative	7.17
8	INDUSTRY DYNAMICS AND GROWTH PROSPECTS	8.1
8.1	The Dynamics of the Market Place	8.1
8.2	Fire Statistics	8.3
8.3	The Present Status of IBC(f) Penetration	8.5
8.4	Factors For and Against Growth	8.9
9	MARKET SIZE AND FORECAST TO 2012	9.1
9.1	Future Demand for IBC(f) Systems in India	9.1
	PART II - DEMAND SIDE ANALYSIS	
10	FORCES THAT DETERMINE DEMAND	
10.1	Introduction	10.5
10.2	Demand Side Drivers	10.7
10.3	Supply Side Drivers	10.11
10.3.1	Supply Capacity/Capability	10.11
10.4	The Future	10.13
11	CONVERGENCE OF IT & INTELLIGENT INFRASTR. IN BUILDINGS	
11.1	Introduction	11.3
11.2	What is IT-Convergence & Why is it Important?	11.5
11.3	Has IT-Convergence Crossed the Chasm?	11.9
11.4	IT-Convergence & Tech. Infrastructures Phases of Adoption	11.11
11.5	Roadblocks that have to be Overcome	11.13
11.6	Organising for IT-Converg. - Changing the Business Model	11.17
11.7	Getting the Message Across	11.21
12	TECHNOLOGY	
11.1	Overview of Technological Features	11.3
11.2	Standards FDA Codes & Regulations - India	11.5
11.2.1	Introduction	11.5
11.2.2	Product Standards	11.5
11.2.3	Design and Installation Codes	11.6
13	COMPARISON WITH CHINA AND OTHER BRIC'S	
13.1	Introduction - What is Driving this Vibrant Economy?	13.3
13.2	Comparison of India with Other BRIC Countries	13.7
13.3	Impact of Building Construction Market on the IBC Industry	13.9
13.4	The Drive for New Technology	13.13





### GENERAL APPENDIX

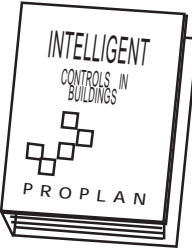



# INTELLIGENT CONTROLS IN BUILDINGS THE INDIA MARKET 2007-2012



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