

Press Release

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Smart home market: impressive growth; new opportunities **KNX is the most popular protocol in European markets** **sharing more than 70% of the total market value.**

Contact:

No:

Release Date: **Immediate**

BSRIA are pleased to present the results of their European Smart Home Market Study, which includes six in-depth reports on different European markets (Germany, France, UK, Netherlands, Belgium, Norway) and the summarising Pan-European Report. In BSRIA's smart home series - for the first time in the market - an encompassing overview of smart home technologies is given. This study is the one of the first to comprehensively analyse all the available knowledge on smart home technologies and generate reliable market data. BSRIA undertook the research by interviewing and exchanging information with the top players and stakeholders around Europe

Although the smart home market is closely associated with high-end niche solutions, it still has room for growth and is expanding at an impressive rate. According to BSRIA estimates, in 2011 the European smart home market value reached 600 million euros, which is 13% higher than in the previous year. Approximately 70% of the market value is generated by products, the rest being added by system integration.

With a share of 48% of the total European smart home market value, Germany is the largest manufacturer and consumer of smart home solutions. Correspondingly, German home automation manufacturers account for 70% of total smart home product, with ABB, Hager, Gira, and Siemens being Pan-European market leaders. France and the UK, the next biggest markets, cannot boast the same scale, accounting for only 10% and 8% of the European market respectively.

The smart home market is highly concentrated in the high-end housing segment, as bespoke solutions for luxury properties account for two-thirds of the market. The second most important niche (approx. 20% of the market value) is small and medium-sized businesses, which use residential smart home applications in commercial buildings, hotels, and restaurants. Affordable medium-range residential solutions are still not very common. However, major home automation manufacturers have started to pay more attention to promoting medium-range smart home systems. The success of medium-range standardised solutions is, however, highly dependent on the position of housing developers.

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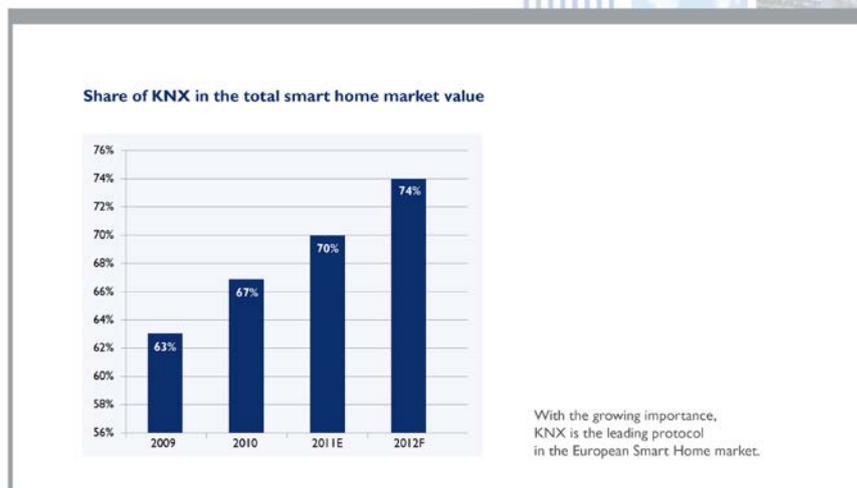
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Due to the commitment of major German manufacturers and active position of the KNX Association, KNX has been established as the most popular protocol in most of European markets. It largely contributes to the growing technological integrity of the industry. According to BSRIA estimates, in 2011 the share of KNX-based solutions exceeded 70% of the total market value. In the last three years, the KNX share has been adding three percentage points on average, suggesting the growing importance of KNX across Europe. Even in the UK, which is more of a bespoke market compared with continental Europe, the share of KNX is progressively increasing, having exceeded one-third of the market by the end of 2011.

Comfort and convenience will be the key demand side drivers, with high-income households and commercial clients remaining the major client segments, generating stable demand. In the medium term, however, we expect that the market will be moving towards simpler and less expensive mid-range solutions (basic light scenario – temperature controls – blinds). Assisted homes solutions are another interesting opportunity sector set to expand in the future.

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Current situation Smart Home / home automation



Excellence in Market Intelligence

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