

The World Market for Smart Home Energy Management Systems - 2012 Edition

Catalogue Number: 2009

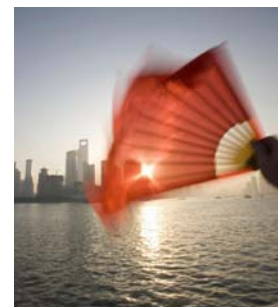
A new three volume study, providing clear analysis and forecasts (to 2016) of the market for eleven key energy management devices, in 26 countries & sub-regions.

Key Questions Answered

- How many smart home energy management devices were shipped in 2011, and in which countries? What were the revenues, and how will this change by 2016?
- What proportion of residential devices - such as thermostats, electric water heaters and home appliances - will have 'smart grid' functionality in 2016?
- What are the country-specific factors impacting the smart home energy management device market, and which countries are set to offer the biggest opportunity areas?
- Which HAN devices - such as smart thermostats, smart load control switches and smart plugs - will be the most widely deployed? How does this vary by country?
- How many of these devices will be shipped via utility companies? How many will be shipped via other channels, such as retail markets or service providers? Where?
- Which connectivity technologies will be used for each device, in each country? How is this impacted by the use of gateways and the involvement of service providers?

Why IMS Research?

- Over 300 data tables => Fully supported by qualitative analysis
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The World Market for Smart Home Energy Management Systems - 2012 Edition

- Separate analysis of 26 sub-regions. Each section reviews country-specific trends and legislation, including dedicated forecasts built-up at a country level. These include:
- Detailed analysis of 11 different smart home energy management equipment types, including forecasts for both standard and smart grid-enabled devices.
- Market size estimates for 2009 to 2011 with year-on-year revenue, shipment and pricing forecasts to 2016.
- Analysis and projections of the supply channels for each device, quantifying when and where retail channels and service provider deployments will be most significant.
- Full analysis of the in-home network architecture, projecting where (and in what volumes) HAN or IP gateways will be deployed alongside smart meters.
- Segmentation of each device (by country) of the in-home connectivity technologies employed to enable communication with either smart meters or other gateway devices.
- The report is highly statistical in nature, containing over 300 data tables.
- Country-specific analysis accompanies the statistical data to highlight key growth areas and major trends impacting the market.

Single User License for one regional volume - EMEA, Americas or Asia Pacific (PDF) - \$6970 / €5130 / £4100.

Single User License for all three regional volumes & global summary document (PDF) - \$13940 / €10260 / £8200.

See Page 4 for full details.

EXAMPLE TABLE
The World Market for Discrete Energy Managers & Gateways
Units Shipped (000s)

	2009	2010	2011	2012	2013	2014	2015	2016	SUM 09-16
The Americas	XX	XX	XX	XX	XX	XX	XX	XX	XXX
Brazil	X	X	X	X	X	X	X	X	X
Canada	X	X	X	X	X	X	X	X	X
Mexico & Central America	X	X	X	X	X	X	X	X	X
Rest of Latin America	X	X	X	X	X	X	X	X	X
United States	X	X	X	X	X	X	X	X	X
EMEA	XX	XX	XX	XX	XX	XX	XX	XX	XXX
Africa	X	X	X	X	X	X	X	X	X
Austria & Switzerland	X	X	X	X	X	X	X	X	X
Benelux	X	X	X	X	X	X	X	X	X
France	X	X	X	X	X	X	X	X	X
Germany	X	X	X	X	X	X	X	X	X
Italy	X	X	X	X	X	X	X	X	X
Middle East	X	X	X	X	X	X	X	X	X
Nordic Countries	X	X	X	X	X	X	X	X	X
Poland	X	X	X	X	X	X	X	X	X
Russia & CIS	X	X	X	X	X	X	X	X	X
Spain & Portugal	X	X	X	X	X	X	X	X	X
Turkey	X	X	X	X	X	X	X	X	X
UK & Ireland	X	X	X	X	X	X	X	X	X
Rest of Europe	X	X	X	X	X	X	X	X	X
Asia	XX	XX	XX	XX	XX	XX	XX	XX	XXX
Australia	X	X	X	X	X	X	X	X	X
China	X	X	X	X	X	X	X	X	X
Japan	X	X	X	X	X	X	X	X	X
India	X	X	X	X	X	X	X	X	X
South Korea	X	X	X	X	X	X	X	X	X
Taiwan	X	X	X	X	X	X	X	X	X
Rest of Asia	X	X	X	X	X	X	X	X	X
Total Shipments Growth	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
	X.X%	X.X%	X.X%	X.X%	X.X%	X.X%	X.X%	X.X%	X.X%

Source: IMS Research Jan-12

Report Introduction

For each of the 26 sub-regions, this report offers clear analysis of country-specific factors, such as the electricity market structure, key legislation and mandates, investment in smart meter deployments, availability of time-of-use or dynamic pricing, and examples of key pilots or roll-outs.

With over 300 data tables, this study provides shipment, revenue and pricing estimates (2009 to 2011) and projections (2012 to 2016) for eleven energy management devices within 26 sub-regions. For each, this is further segmented by supply channel, namely utility company programs or other channels, such as retail markets or via service providers.

Country-specific analysis of in-home network architectures is included, such as where smart meters will integrate gateways to communicate with HAN devices directly; where discrete gateways or 'energy managers' will be common (and the types of company providing them); and where 'integrated' energy managers will be launched. Full segmentation by in-home connectivity technology is included.

Market Breakdown

By Country - Americas Volume

- Canada
- United States
- Brazil
- Mexico & Central America
- Rest of Latin America

By Country - EMEA Volume

- Africa
- Austria & Switzerland
- Benelux
- France
- Germany
- Italy
- Middle East
- Nordic Countries
- Poland
- Russia & CIS
- Spain & Portugal
- Turkey
- UK & Ireland
- Rest of EMEA

By Country - Asia Pacific Volume

- Australia
- China
- India
- Japan
- South Korea
- Taiwan
- Rest of Asia Pacific

By Product Type

- Thermostats
- Home Appliances
- In-Home Displays
- Smart Plugs
- Electric Water Heaters
- Residential Electric Vehicle Chargers
- Residential PV Systems
- Other Smart Load Control Devices

By 'Smart' Device Functionality

- 'Standard' Devices
- Smart Grid-enabled

By Energy Manager & Gateway Device

- Smart Meters
- Discrete Energy Managers & Gateways
- Integrated Energy Managers & Gateways

By Supply Model

- Via Utility Company or Government Organization
- Via Other Channel (e.g. Retail or Service Provider Deployments)

By Connectivity Technology

- ZigBee
- Wi-Fi
- Z-Wave
- Other RF
- Powerline



Table of Contents

The 'Table of Contents' of the EMEA & Global Summary Volumes are presented as an example below.
The Asia Pacific and Americas Volumes are formatted identically to the EMEA Volume.

EMEA Volume

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- 2.1 EMEA Market Summary
- 2.2 EMEA Supply Channels
- 2.3 Smart Meters
- 2.4 Smart Thermostats
- 2.5 Smart Plugs & Plugstrips
- 2.6 Smart Electric Water Heaters
- 2.7 Smart Appliances
- 2.8 Smart In-Home Displays
- 2.9 Residential EV Chargers
- 2.10 Residential PV Systems
- 2.11 Other Smart Load Control Devices
- 2.12 Smart Energy Managers & Gateways
- 2.13 In-Home Connectivity

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Appendix A - Country & Regional Summary

Global Overview Volume (Only available when all 3 regional volumes are purchased)

Chapter 1 - Introduction & Scope

Chapter 2 - Global Overview

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