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Smart Buildings Intelligence Service

Part of the Smart Buildings & Energy Infrastructure Service Area Package

Smart Buildings & Energy Infrastructure team

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Smart Buildings Intelligence Service

Part of the OMDIA Smart Buildings & Energy Infrastructure Service Area Package

HOW OMDIA HELPS YOU

- Size global market for smart building technologies: Connected hardware and BMS software and platform
- Understand the competitive landscape
- Delivers ongoing market insight into smart building product markets on a regional and vertical application level
- Identify macro and micro trends by granular product or regional segmentation based on a proven reported data-based methodology.

KEY QUESTIONS ADDRESSED

- How are developments in building management system (BMS) platforms and how certain pieces of equipment connect through these platforms in buildings.
- How are the competitors doing in the market? What is the strategy for smart buildings provider and its market shares?
- How does different end-use sectors look like and the opportunities of each verticals?
- What portion of BMS platform analytics are performed on-site, versus in the cloud? What trends are influencing the adoption of cloud or edge computing frameworks?
- What additional functionalities can integrate systems offer in the most advanced smart buildings? What barriers are preventing more buildings from upgrading to incorporate these functions today?
- What are the key applications which are driving new spend and unlocking different innovation budgets?

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Smart Buildings: Meet Our Experts Team

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Smart Buildings: Deliverables

DATABASE

—Annual—

Forecasts and market share estimates, delivered in Excel

BRIEFS & REPORTS

—Annual—

Market briefs offer analysis of and insights from the dataset; reports provide analysis of key technology trends and industry conferences

ANALYST INSIGHTS

—Ongoing—

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.

ANALYST ACCESS

—Ongoing—

For prompt responses to urgent and unique questions.

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Convergence of technologies is driving the Smart Buildings market, and Omdia tracks each individual domain.

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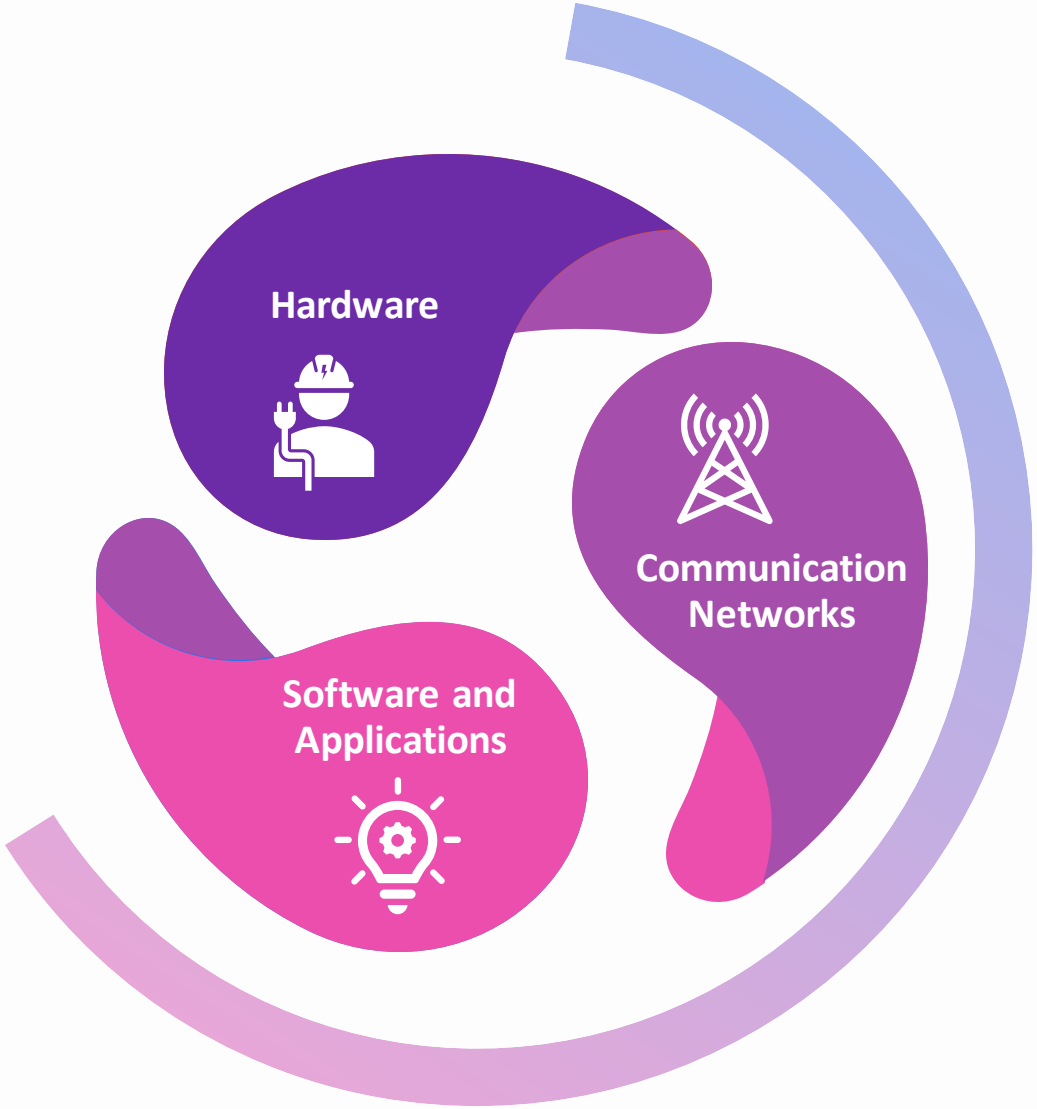
The Industry Story…

The standard industry evolution; From hardware, to network, to software and application.

- Almost every industry is going through the same challenge, as traditional hardware markets take on the power of IoT. In particular, that means the move towards choice of connectivity solution, followed by the rising importance of software and data applications.
- The Smart Buildings Intelligence Service and Smart Utility Meter Intelligence Service therefore focuses on this transition – from the hardware involved, through the enabling connectivity, to the software applications being layered on top.



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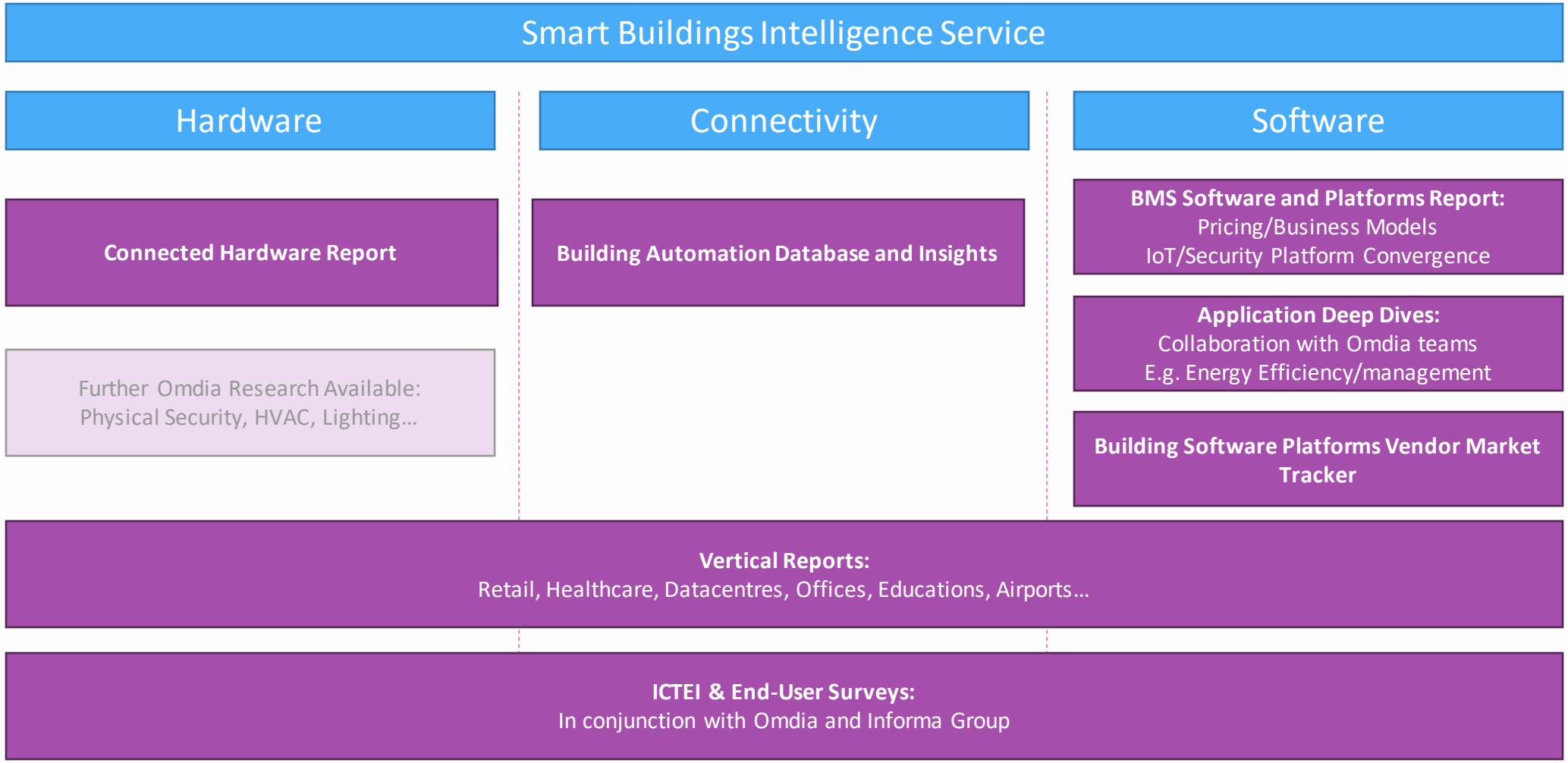
Key Research Pillars



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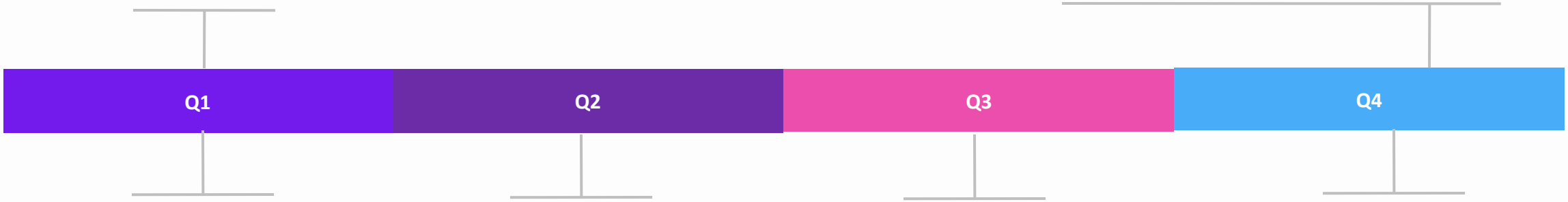
Smart Buildings Intelligence Service
2024 Publication Calendar

BMS Report
Analysis covering an element of the building management software market: energy management

BA Database & Insights
This analysis including building automation data and market insights

Connected Hardware Report
The 2024 edition of the flagship deliverable, now including connectivity analysis by domain



Building Software Platforms Vendor Market Tracker
Analysis covering an element of the different building software and building platform vendor condition

Topical Reports
Vertical report on Commercial buildings

HVAC and Heat Pump Equipment Report
This analysis including HVAC related data and market insights

ICTEI & End-user Survey
This survey will analyse the latest drivers and challenges for smart buildings

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Smart Buildings: Core Reports and Database(1/2)

Connected Hardware and Connectivity Report

Frequency: Annual
Measures: Revenues, Units, Attach rates (of connected equipment with BMS platforms)
Regions: North America, Western Europe, Asia & Oceania and Rest of World

- By types

Energy
  - Building automation equipment
  - Lighting
  - HVAC
  - Electric meters and Water meters
  - Thermostats

Safety & Security
  - Video surveillance
  - Fire detection and suppression
  - Intruder detection
  - Access control
  - Public address system devices

Other
  - Elevators
  - Smart speakers
  - Other connected devices

- By connectivity type
  - Open
  - Proprietary
- By connection type
  - Wired
  - Wireless
- By building size
  - Enterprise
  - Small and medium
- By integration level
- By End-user sectors
  - Commercial
  - Educational facilities
  - Government buildings
  - Healthcare
  - Leisure and hospitality
  - Retail
  - Other

Building Management Systems Platforms Sustainability Report

Frequency: Annual
Measures: Revenues
Regions: North America, Western Europe, Asia & Oceania and Rest of World

- By types
  - Energy management (BEMS)
  - Safety and security management
  - All Building systems management
- By location of data processing
  - Locally hosted
  - Cloud
  - Edge
- New construction vs retrofit
- BEMS by supplier type
- Market share
  - World
  - Regional
- By End-user sectors
  - Commercial
  - Educational facilities
  - Government buildings
  - Healthcare
  - Leisure and hospitality
  - Retail
  - Other
- By supplier type
  - Tier 1 hardware/software
  - Tier 2 hardware/software
  - Pure software (AI and analytics)
  - Pure software (Energy information systems)

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Smart Buildings: Core Reports and Database(2/2)

Building Automation Database and Insights

Frequency: Annual
Measures: Revenues, Units, ASP
Regions: North America, Western Europe, Asia & Oceania and Rest of World

- By end-user sectors
  - Airports
  - Other transport
  - Commercial
  - Data Centers
  - Education
  - Government
  - Healthcare
  - Industrial and Manufacturing
  - Leisure and Hospitality
  - Multi-dwelling
  - Retail
- Market share
  - World
  - Regional
- By types
  - Systems Installation
  - Analysis & Design
  - Installation
  - Equipment and Services
  - Maintenance and Remote Services
- By product type
  - Controllers
  - Sensors
  - Actuators
  - Gateways
  - HMI Screens
  - BA Software
- By building size
  - Enterprise
  - Small and medium
- Controllers by application
  - Field controllers
  - Plant controllers
  - Room controllers
  - Supervisory controllers
- Sensors by type
  - Temperature
  - Humidity
  - Air Quality
  - Pressure
  - Occupancy, Light & Motion
  - Multi-function
- By sales channel
- By protocols: BACnet; LonWorks; KNX; Modbus etc.

HVAC and Heat Pump Equipment Report

Frequency: Annual
Measures: Revenues, Units
Regions: North America, Western Europe, Asia & Oceania and Rest of World

- By end-user sectors
  - Residential
  - Non-residential
  - Institutional
  - Education
  - Government and healthcare
  - Commercial
  - Industrial and manufacturing
  - Others
- Market share
  - World
  - Regional
  - By product types (heat pumps)
- By product types
  - Chillers
  - Air Handling Units
  - Heat Pumps
  - Packaged Units
  - Fan Coil Units
  - Condensing Units
  - Variable Refrigerant Flow
  - Electric Furnaces
  - Boilers
  - Oil and Gas Furnaces
- Heat Pump by product types
  - Air source
  - Water source
  - Ground source
- Heat Pump by capacity
  - <10kW
  - 10–20kW
  - >20kW
- Heat Pump by region and country markets
  - Asia & Oceania (China, Japan, India, South Korea, Australia, Rest of Asia & Oceania)
  - EMEA (France, Italy, Germany, Spain, Middle East & Africa, Eastern Europe, Rest of Europe)
  - Americas (US, Canada, Latin America & the Caribbean)

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Smart Buildings: Market Briefs

3-4 topical reports that provide valuable strategic or technologic insight into key topics currently influencing the Smart Building industry development. These include the following topics:

ICTEI & Smart Building End-Users Survey

Frequency: One per year

Provides an in-depth understanding of end-user's perspective on smart building products. What do the end-users recognize as the most compelling benefits of smart technologies for their buildings? What do end-users recognize as the most compelling drivers to use smart building technologies for them/their organization personally? What are the main challenges and barriers for smart building technologies? How do they use and analyze the data collected from their facilities?

Building Software Platforms Vendor Market Tracker (Strat from 2024)

Frequency: One per year

Analyses of the latest developments of different types of software and platforms used in buildings, including Energy Management software, security software, building IoT Platform, other Innovative software etc.

Vertical Report Deep Dives

Frequency: one per year

Delivers an in-depth analysis on several verticals such as small and mid-sized buildings, healthcare, education and utilities for instance. It researches various themes, key trends, leading players, connectivity technology, business models in a project group. This tool helps understand the maturity and the potential for future development of different verticals.

Analyst opinion/ technological trend report

Frequency: One per year

Analyses of the latest technological developments and hot topics occurring on the smart buildings market. Topics include connectivity trends in buildings, BIM Software, Digital Twins and 3D Modeling and the integration of HVAC equipment through BMS platforms etc.

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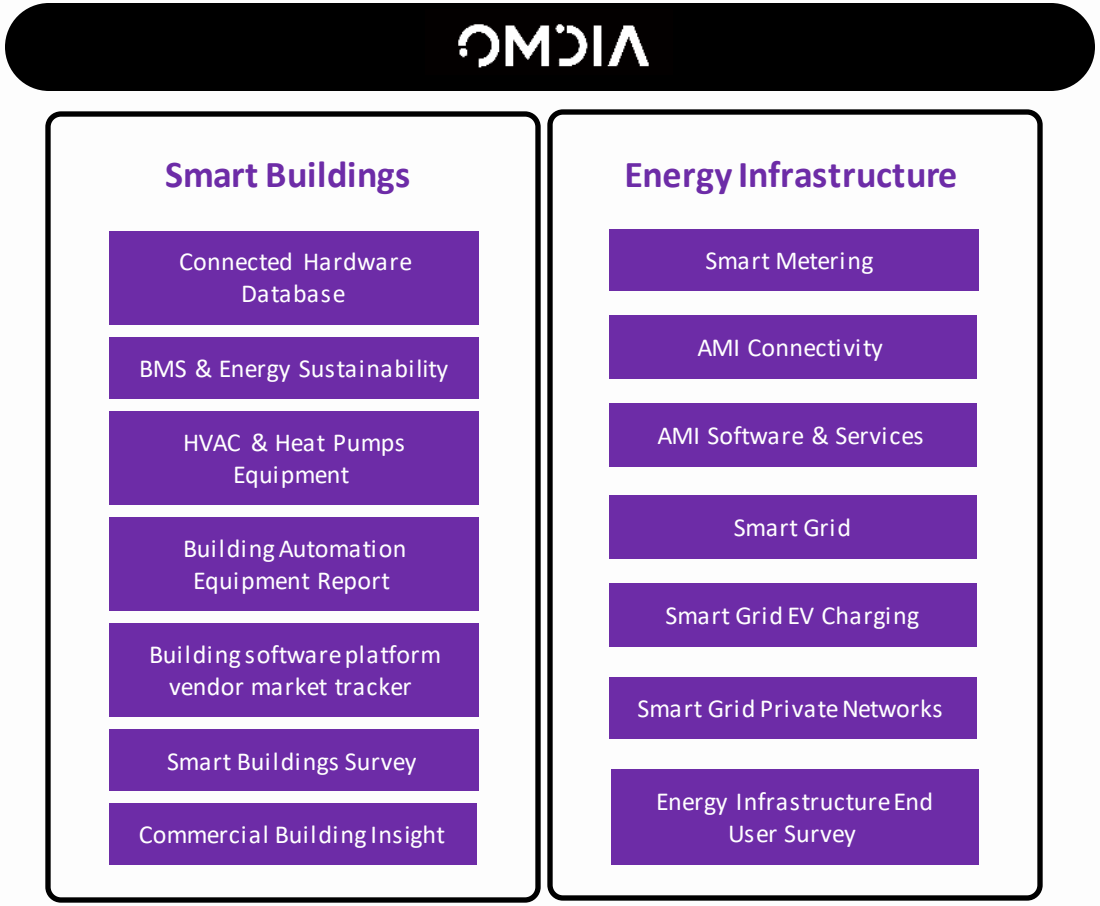
Smart Buildings & Energy Infrastructure Service Area Coverage



About Omdia's Smart Buildings and Energy Infrastructure Research

The Omdia Smart Buildings & Energy Infrastructure team brings together the areas of utility and smart grid, power and charging technologies, and smart building technologies. We help our clients track the evolution of industries from purely hardware driven, through the challenge of connectivity, and towards the future of software, services and solutions. Our global team of analysts bring unique insights to our market studies – with industry-leading expertise across subjects such as smart metering, wireless power and building management software. For the building technology market, we also harness the full power of Omdia to bring deep-dive analysis for building automation equipment, smart buildings, lighting, HVAC, and from our Physical Security team.

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