Fire Detecting Collection Group

North America

Proposal June 2024

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BSRIA has received inquiries from several suppliers who would be interested in participating in a collection group for fire detection equipment. They know of the ASHB BACS North America collection group and would like a similar arrangement.

Suppliers that ideally should be included in the collection are as follows:

- Siemens Inc
- Honeywell
- JCI
- Carrier
- Bosch/Robert Bosch
- Eaton
- Halma
- Potter
- Jade Bird

The aim is to have a coverage of 2/3 of the market for fire detection equipment. It is very difficult to include suppliers at a later stage. Efforts will be made to include the above 9 suppliers from the beginning and gain coverage of around 75-80% of the market for panels, detection equipment, and alarms.

Source: BSRIA World BACS overview – February 2024

2. Product Coverage

Draft Proposal (to be modified based on input from suppliers)

Direct and indirect channel sales of branded products (USD m) + OEM sales to suppliers outside the group

Software applications	Control panels	Detectors / Initiating devices	Alarms
- Monitoring and control software - Analytics	Segmented by IO points: - Small (100 or less) - Medium (101 – 1000) - Large (Over 1000) - Networked - Non-networked	- Smoke detectors - Fire/heat detectors - CO detectors? - Manual call points? - Modules?	Notification device: - Audio only - Visual /Led panel only - Audio and visual

Collection Group

- A quarterly collection of top-line numbers*

- Geographic coverage: North America (USA + Canada)

- Output: aggregated market data (no market shares)

Yearly Publication

- Total market North America

- Forecast and trends

- Installed value (products + other products + labour)

- Verticals (by building type)

- Channels to market

Timeline and Cost

- 3 – 5 year contract

- Delivery: 1 - 2 years historical data at the start

- Each participant pays USD 14,000 yearly for 3/5 years

Reporting Format and Meetings

- Quarterly aggregated data based on input from suppliers

- A yearly meeting/call to discuss market size and trends

- Additonal questions can be added over time if members agree. To start with, the consensus is to keep it simple.
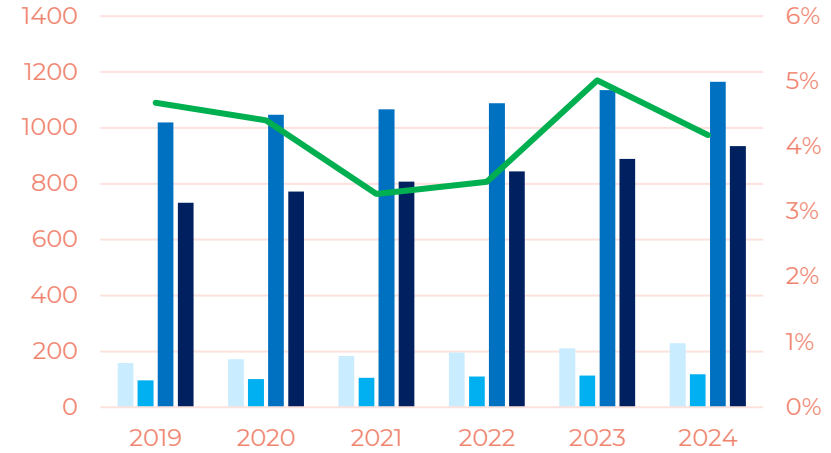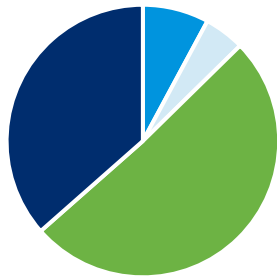
* If a supplier misses the deadline for the collection, BSRIA will estimate based on previous numbers and general trends, so that individual company numbers are not revealed
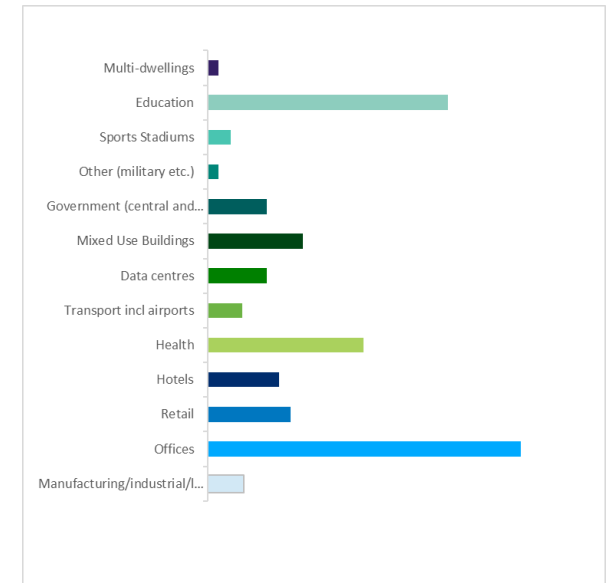
Yearly NA Fire Detection Report

- Total market North America

- 5-year forecast and trends

- Market characteristics

- Channels to market

- Verticals (by building type)

- Installed base (products + other products + labour)

- Includes an opportunity to assess market coverage of the collection group

Technology drivers

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Timeline

Year		2024							2025												2026												2027											
Months		6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
Contract (scope)		▩	▩	▩																																								
Contracts signed			▩	▩																																								
Submit data									▩			▩			▩			▩			▩			▩			▩			▩			▩			▩			▩			▩		
Aggregated data available										▩			▩			▩			▩			▩			▩			▩			▩			▩			▩			▩			▩
Yearly report																	▩												▩												▩		
Yealy meeting																	▩												▩												▩		

- The members commit to supply data and will receive the aggregated data every quarter

- The collection group will meet yearly to discuss scope and definitions to ensure the outcome is as accurate as possible

- The yearly meeting will include a presentation on market sizing, trends, and forecasting

Fees

USD 14,000 per year per supplier (3-5 year contract)

Suggested Deadlines:

Data Submission:

- End of January, April, July, October

Collection Group Output:

- February, May, August, and November (~ 2 weeks after submission)

Report publication:

- September (?)

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Fire Detection & Alarm Collection Group Informational Session:

- **Date:** Thursday, July 25, 2024
- **Time:** 11am-12pm ET
- **Zoom Registration Link:** https://us02web.zoom.us/webinar/register/WN_jJ1aAt8NRjeCFl8_vW2tlg

Join us for an informational session where you can learn more about the **Fire Detection & Alarm Market Sizing Study** and how you can participate. This annual project, undertaken by ASHB in partnership with BSRIA and supported by industry-leading companies, focuses on the North American market, providing insights on market forecasts, trends, channels to market, installed value (products and associated labor) and vertical segments.

During this session, you will have the opportunity to:

- Ask questions about the project's scope and objectives.
- Understand the data collection and aggregation process.
- Learn about the benefits of participating in the study.
- Discuss the type of data you will receive and how it can benefit your organization.
- Address any other inquiries you may have regarding this ongoing project.

To Learn More Contact: klopotowska@ashb.com

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BSRIA	WMI
■ 800+ member-based Association ■ Technical knowledge & information, Consultancy & Investigation ■ Testing to standards and product testing ■ Promotes best practice in buildings	■ 25+ years of Market Intelligence in A/C, BACS, heating, Heat Pumps, structured cabling etc. ■ Independent, authoritative studies ■ Unrivalled technical expertise ■ Research in 50+ countries

INNOVATIVE

AUTHORITATIVE

INDEPENDENT

BSRIA VALUES

COLLABORATIVE

BSRIA
Making buildings better

Building **S**ervices **R**esearch & **I**nformation **A**ssociation

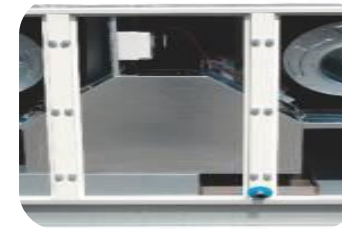| Group	Frequency	Length of running	Deliverables	Group Coverage
BACS	Quarterly	4 years	Aggregated group results	80% controls
Standard Splits	Quarterly	Over 25 years	Aggregated group results	85% +
VRF/VRV	Quarterly	Over 15 years	Aggregated group results	91%+
Chillers HVAC	Biannually	Over 20 years	Aggregated group results + total market figures	70%+ by value
Heat Pumps	Quarterly	Over 10 years	Aggregated group results	79% (A2W) 33% (G2W)
Heat Recovery Ventilators	Quarterly	Over 5 years	Aggregated group results	Approximately 35%
Electric & Mixer showers	Monthly	Mixer: o. 25 years Electric: o. 15 years	Aggregated group results	Electric > 80% Mixer >55%

Controllers

Electric and Mixer Shower Groups

Standard Splits

Chillers

VRF

Heat Recovery Ventilators

Heat Pumps

About ASHB

The Association for Smarter Homes & Buildings (ASHB) is a leading international, not-for-profit organization promoting advanced technologies in homes and buildings since 1988.

Membership: Nearly 300 member companies, including OEMs, software developers, master integrators, building developers, owners, facility managers, governmental organizations, research organizations, B2B associations, conference producers, and media companies.

Mission: To foster informed thought leadership and collaboration within intelligent built environments, delivering a more livable, sustainable, and efficient connected world.

Vision: Empower connectivity among people, spaces, and technology for a better tomorrow.

Goals:

• Develop relevant, actionable content for members.

• Enhance user experience with an effective content management system.

• Increase awareness of ASHB and intelligent built environments.

• Foster collaboration among industry thought leaders and organizations.

Website: ASHB Governing Principles

Current ASHB/BSRIA Project in Progress:

BACS Market Sizing Study

Since 2019, ASHB, in partnership with BSRIA and supported by industry-leading companies, has conducted an annual Building Automation Control Systems (BACS) market sizing study. This project focuses on the North American market, forecasting trends, market channels, installed value, vertical segments, and the adoption of convergence versus stand-alone systems. Additionally, ASHB has a quarterly top-line data collection group to monitor market changes, encompassing software, hardware, and controls.

Website: ASHB BACS Research