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GCC Building Automation Market Whitepaper for SPS Automation

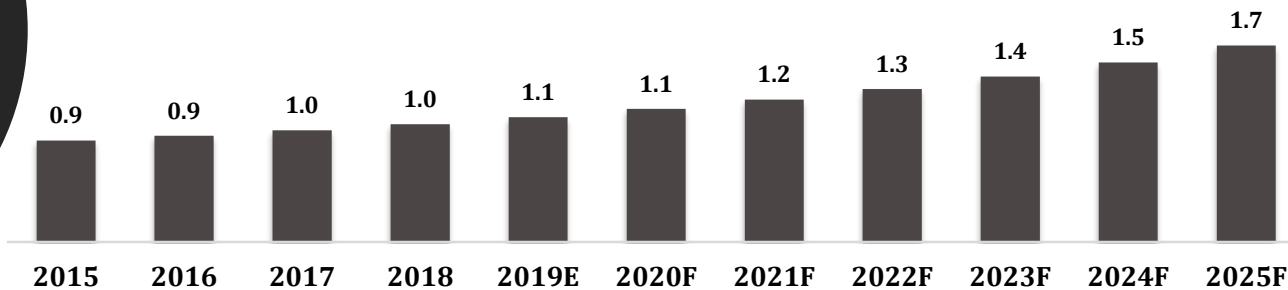
sps automation
MIDDLE EAST

GCC Building Automation Market

GCC Building Automation Market Revenues, \$ Billion (2015-2025F)

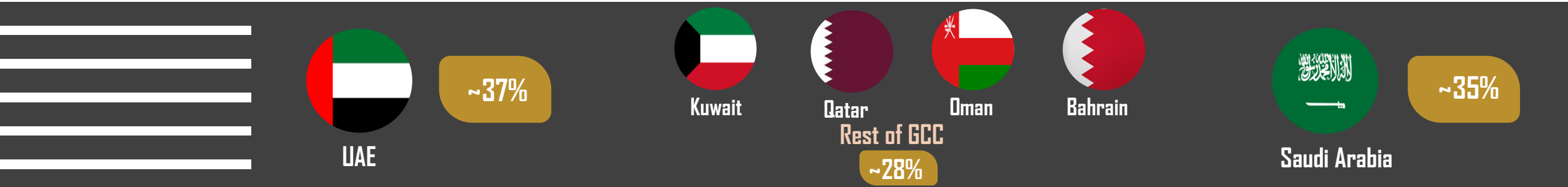
**CAGR
2019E-25F
~ 8%**

Global events including the Dubai Expo 2020 and mega projects such as Saudi's NEOM city are also driving forces behind advanced control systems and processes in infrastructure development.



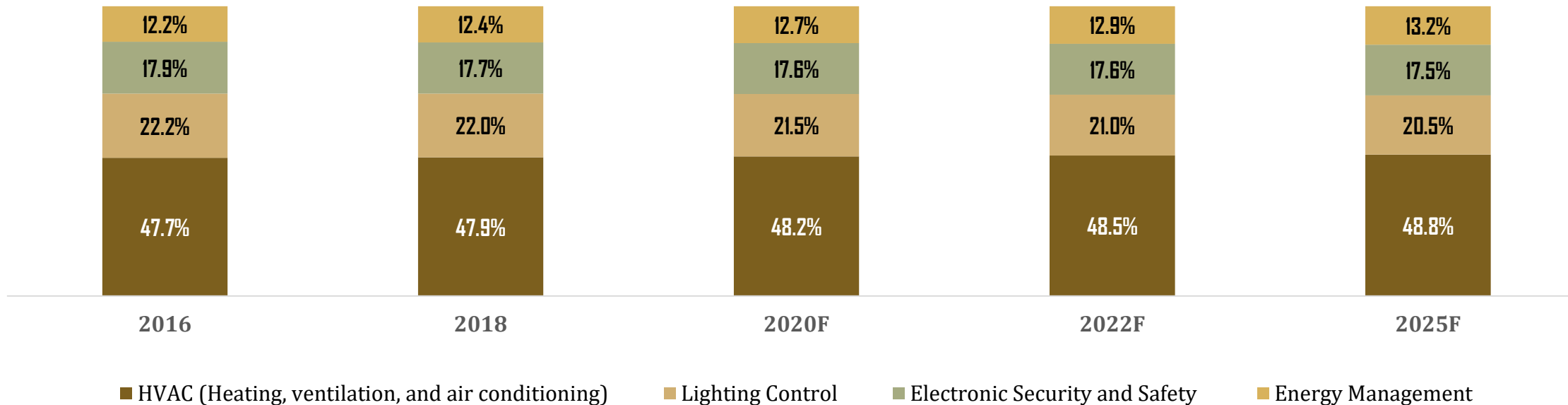
Building automation systems help in monitoring and controlling mechanical operations inside commercial buildings, residential areas and other such premises. They operate on a centralized network support with various software that control and monitor the building's energy demand, security control and heating & cooling systems. Growth in dwelling infrastructure as well as growing awareness about the advanced automation systems has led to the demand for building automation solutions across GCC region. Growing awareness and acceptance of IoT solutions across GCC countries has resulted in further increase in the adoption of building automation products which, in turn, is expected to positively impact the region's building automation market during the forecast period.

GCC Building Automation Market Revenue Share, By Countries (2018)



GCC Building Automation Market, By Types

GCC Building Automation Control Systems Market Revenue Share, By Types (2016-2025F)



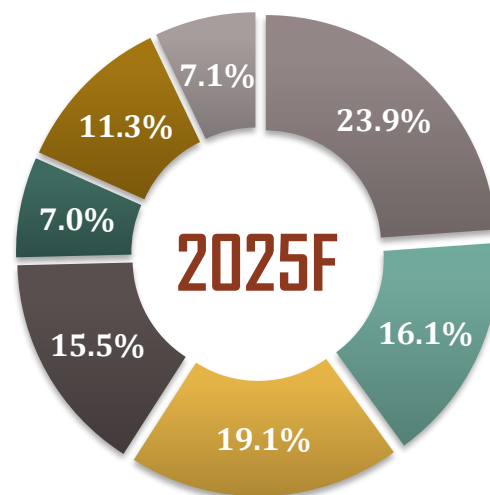
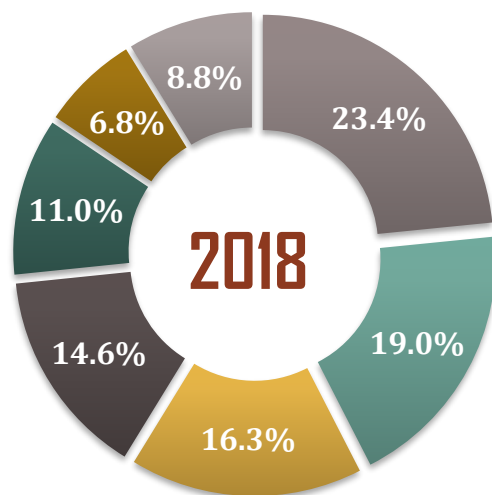
HVAC Market Captured Highest Revenues

Increasing construction activities across GCC in the coming years along with ongoing commercial and residential projects would drive the market for HVAC systems. Additionally, significant rise in temperatures due to change in climatic conditions would also surge the requirement for automatic temperature control equipment in the forecast period. HVAC systems presently have the highest market share in the overall building automation systems market. Advancements in technologies to provide cost effective solutions in addition to growing awareness about such systems would further strengthen the HVAC systems market.

GCC Building Automation Market, By Applications

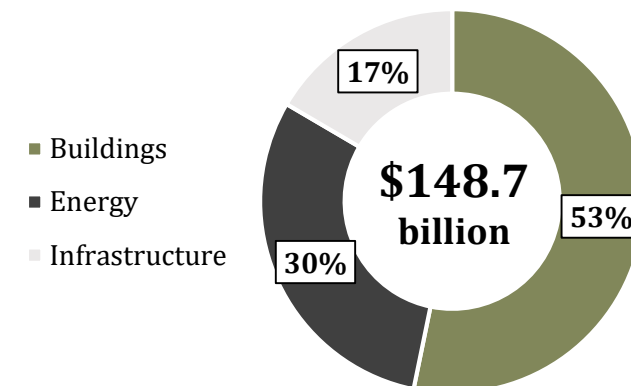
GCC Building Automation Market Revenue Share, By Applications (2018 & 2025F)

Residential and commercial sectors occupied majority of the market share in the GCC building automation systems market in 2018; the hospitality sector is projected to witness the highest growth during the forecast period on account of increasing hotel and mall construction activities across major cities in the region. Tourist footfall is predicted to increase as a result of the Dubai Expo 2020, which would act as the primary driver for the growth of hospitality sector in the region.



■ Residential ■ Commercial office ■ Industrial & Manufacturing ■ Hospitality ■ Retail ■ Transportation ■ Others

GCC and Middle East Construction Contract Awards 2018



Key Projects in GCC Region

UAE World Expo Projects

Blue Water Island
\$1.63 Billion

Dubai Theme Park
\$1.03 Billion

Jewel of the Creek
\$816 Million

Qatar FIFA World Cup Projects

Lusail City
\$45 Billion

World Cup Stadiums
\$16 Billion

New Doha Port
\$7.4 Billion

GCC Building Automation Market Drivers

Surging Demand for Advanced Security Solutions

Many social and economic factors, such as rising disposable income, potential financial returns and luxurious lifestyle, are responsible for the growing acceptance of advanced security solutions across the GCC region. Higher demand for comfort and improved quality of life in the home environment along with growing demand for increased security features are the main reasons behind rise in consumer acceptance of building automation.

Advancement in IOT

Adoption of building automation products and services would continue to grow in the future due to technological advancements in IoT. Advancements, such as voice control modulation and remote monitoring of events, has enriched and simplified the consumer experience further. Incorporation of artificial intelligence and data analytics in smart home systems is also expected to boost the building automation market in GCC over the coming years. Collection of real-time data across various verticals provides the basis for data-driven applications & connected lifestyle.

Growing Penetration of Smart Devices

GCC region recorded considerable increase in demand for smart devices in the last few years. Smart devices, including smart wearables, smartphones, etc., helps users to manage the functioning of several appliances through various wireless protocols such as 3G, Wi-Fi, Bluetooth, etc. In addition, recent advancement in smart home connected systems has not only fostered superior connectivity of different devices but also enabled consumers to regularly check the energy consumption of these devices. The increase in consumer awareness regarding the multi usage of smart devices solutions would further surge the market for building automation across GCC in coming years.



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