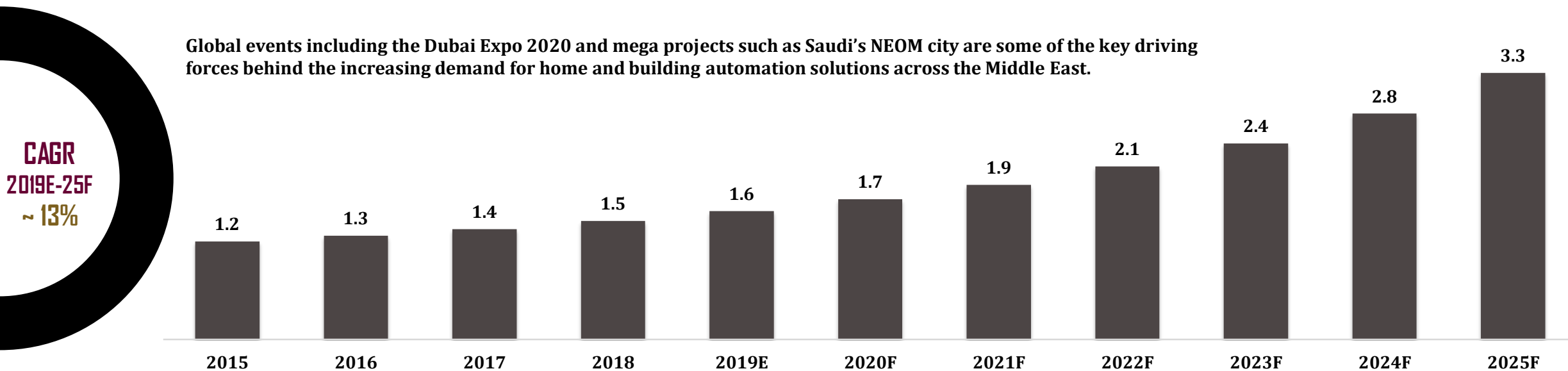**6W**research

Middle East Home and Building Automation Market Whitepaper for Light Middle East

light
MIDDLE EAST

Middle East Home and Building Automation Market
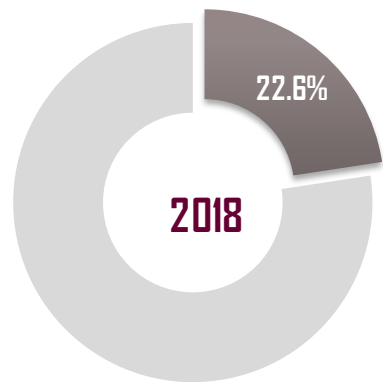
Middle East Home and Building Automation Market Revenues, $ Billion (2015-2025F)

Global events including the Dubai Expo 2020 and mega projects such as Saudi's NEOM city are some of the key driving forces behind the increasing demand for home and building automation solutions across the Middle East.

CAGR
2019E-25F
~ 13%

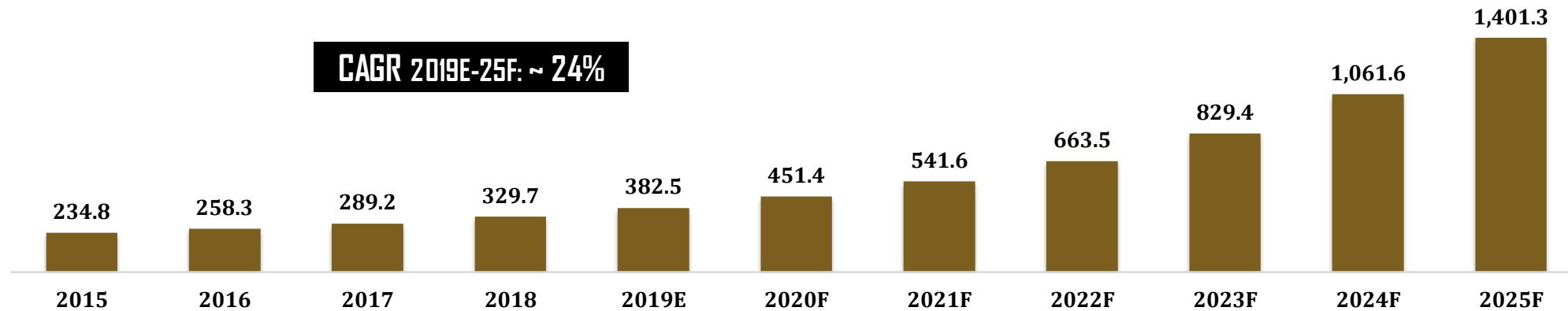| Year	Value
2015	1.2
2016	1.3
2017	1.4
2018	1.5
2019E	1.6
2020F	1.7
2021F	1.9
2022F	2.1
2023F	2.4
2024F	2.8
2025F	3.3

Home and 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. Increase in dwelling infrastructure as well as growing awareness about these advanced automation systems has led to rise in the demand for home and building automation solutions across the Middle East region. Growing awareness and acceptance of IoT solutions across Middle East countries has resulted in further increase in the adoption of home and building automation products which, in turn, is expected to positively impact the region's home and building automation market during the forecast period.
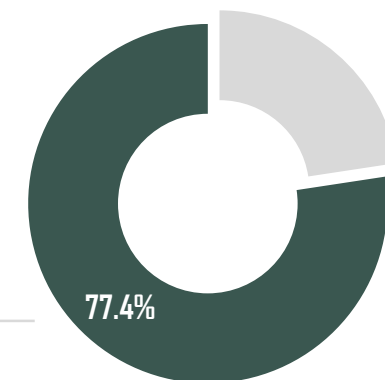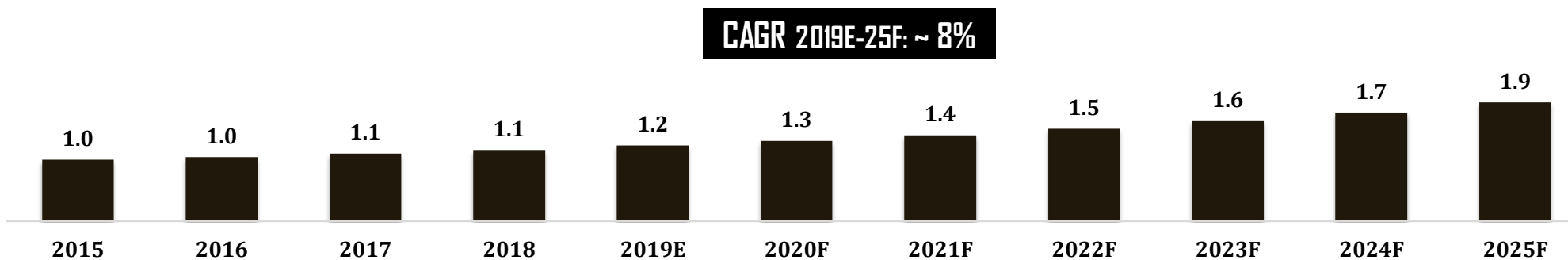
Middle East Home and Building Automation Market

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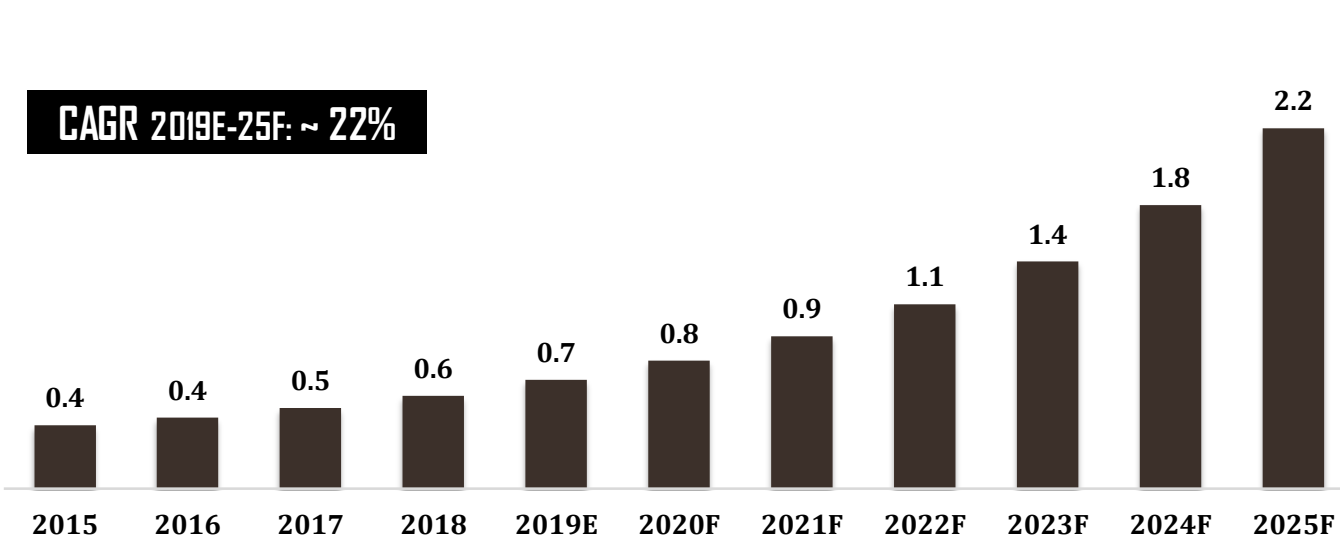## Middle East Home Automation Market Revenues, $ Million (2015-2025F)

22.6%

2018

CAGR 2019E-25F: ~ 24%

- 2015: 234.8
- 2016: 258.3
- 2017: 289.2
- 2018: 329.7
- 2019E: 382.5
- 2020F: 451.4
- 2021F: 541.6
- 2022F: 663.5
- 2023F: 829.4
- 2024F: 1,061.6
- 2025F: 1,401.3

■ Home Automation

Middle East Building Automation Market Revenues, $ Billion (2015-2025F)

CAGR 2019E-25F: ~ 8%

- 2015: 1.0
- 2016: 1.0
- 2017: 1.1
- 2018: 1.1
- 2019E: 1.2
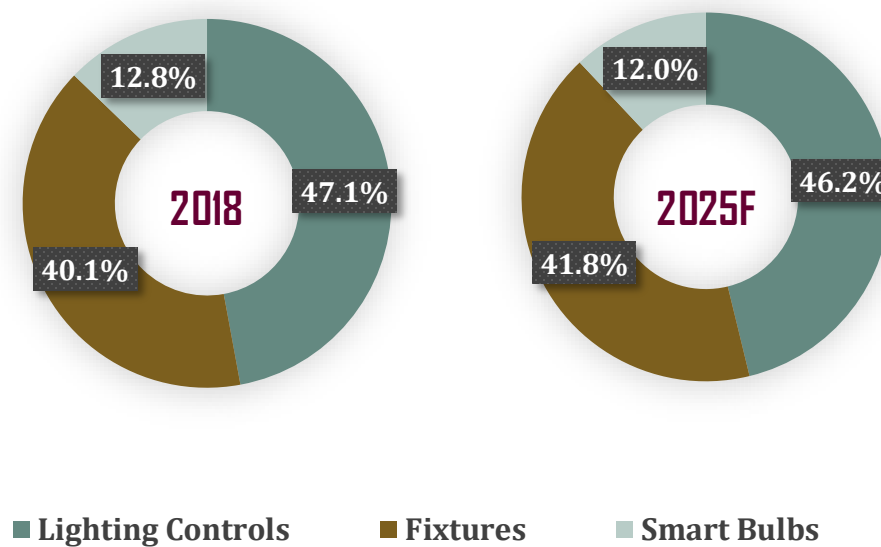- 2020F: 1.3
- 2021F: 1.4
- 2022F: 1.5
- 2023F: 1.6
- 2024F: 1.7
- 2025F: 1.9

77.4%

■ Building Automation

Middle East Smart Lighting Market

Middle East Smart Lighting Market Revenues, $ Billion (2015-2025F)

CAGR 2019E-25F: ~ 22%

Bar chart values: 2015: 0.4, 2016: 0.4, 2017: 0.5, 2018: 0.6, 2019E: 0.7, 2020F: 0.8, 2021F: 0.9, 2022F: 1.1, 2023F: 1.4, 2024F: 1.8, 2025F: 2.2

2018 Donut: Lighting Controls 47.1%, Fixtures 40.1%, Smart Bulbs 12.8%

2025F Donut: Lighting Controls 46.2%, Fixtures 41.8%, Smart Bulbs 12.0%

■ Lighting Controls　■ Fixtures　■ Smart Bulbs

Middle East Smart Lighting market, which includes lighting controls, fixtures and smart bulbs, is likely to register considerable growth, of around 22%, during 2019E-2025F. Rising government initiatives to promote energy efficient lighting solutions coupled with surging demand among consumers for IoT enabled light solutions has further pushed the market. In addition, high per capita income in the Middle East and growing preference for luxury residential solutions is expected to further spur the market growth in the coming years. In 2018, in terms of revenues, light controls captured highest revenue share, followed by fixtures and smart bulbs.
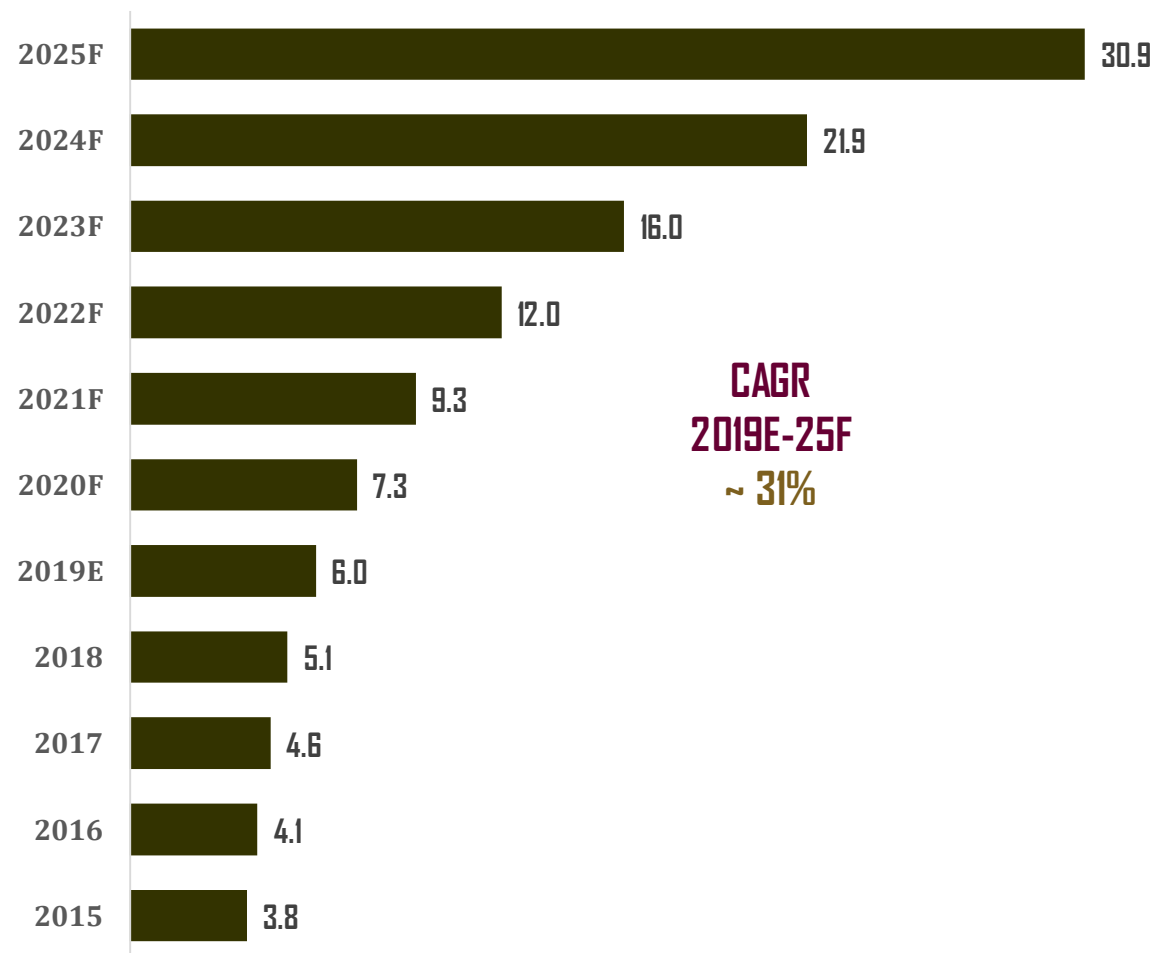
Middle East Smart Lighting Market Revenue Share, By Countries (2018)

UAE	Saudi Arabia	Kuwait	Rest of Middle East
~36%	~34%	~4%	~28%
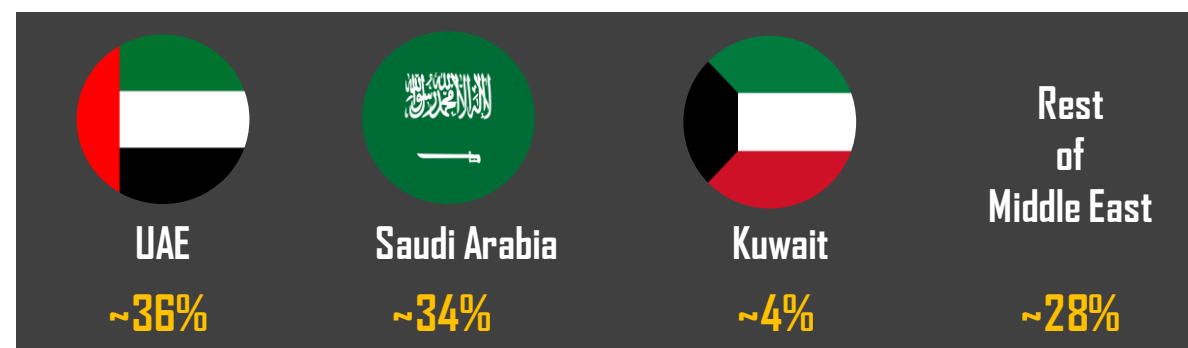
Middle East IoT Market

Middle East IoT Market Revenues, $ Billion (2015-2025F)

Year	Revenue
2025F	30.9
2024F	21.9
2023F	16.0
2022F	12.0
2021F	9.3
2020F	7.3
2019E	6.0
2018	5.1
2017	4.6
2016	4.1
2015	3.8

CAGR 2019E-25F ~ 31%

New Trends in Middle East IoT Market

In the coming years, with emergence of new wireless communications networks designed for IoT applications along with development of advanced IT infrastructure for collection and analysis of IoT sensor data would expand the present IoT solution coverage and push the adoption of consumers towards new and more advanced IoT enabled solutions. Some of the key solutions which are expected to record considerable growth are:

Connected Home — Smart Lighting, Smart Thermostat, Smart Home Security, Interactive Robots, Smart Fridge, Smart Oven, etc.

Connected Car — Self Driving Cars, Remotely lock and Unlock, Automatic Maintenance Reminder, Route Optimization & Traffic, etc.

Connected Entertainment — Smart TV, Game Consoles, Video Streaming Devices, Wireless Speakers, etc.

Connected Health — Smart Wearables, Smart Fitness Equipment's, Fitness Trackers, etc.

Middle East Home and 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 Middle East. Higher demand for comfort and improved quality of life in the home environment along with growing concern for increased security features are the main reasons driving consumer acceptance towards home and building automation.

Advancement in IoT

Adoption of home and 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 consumer experience. Further, incorporation of artificial intelligence and data analytics in smart home systems is expected to boost the home and building automation market in Middle East over the coming years. The collection of real-time data across various verticals provides the basis for data-driven applications & a connected lifestyle.

Growing Penetration of Smart Devices

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

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