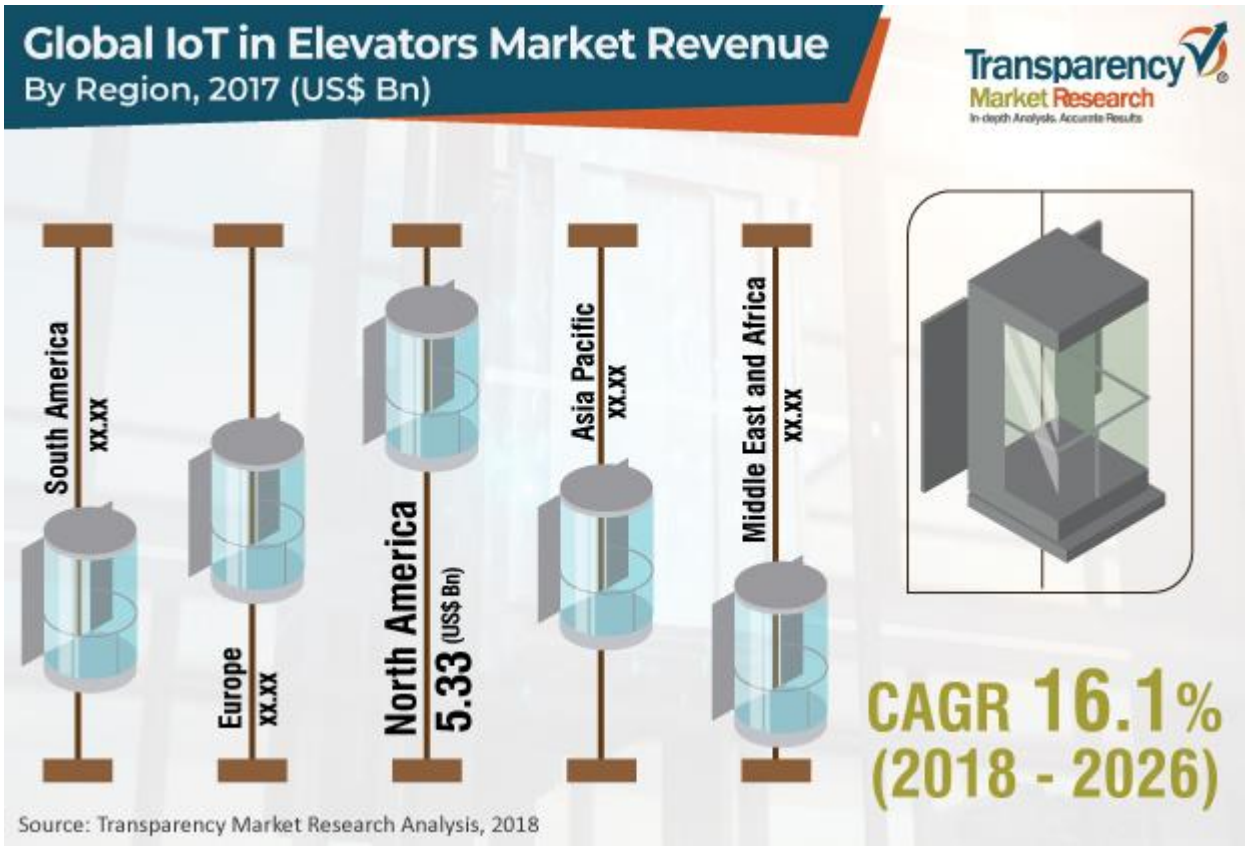
엘리베이터 속 IoT 시장 (부품 – 하드웨어, 소프트웨어, 서비스; 응용분야 – 예방 정비, 원격 모니터링, 보고 기능, 연결 관리; 최종사용자 – 거주지, 상업, 산업) – 글로벌 산업 분석, 규모, 점유율, 성장, 트렌드 및 전망 2018-2026

발행사: Transparency Market Research / 발행일: 2019-01-01 / 페이지: 230 / 가격: Single User PDF; $5,795

개요

IoT사용이 가능한 엘리베이터는 인공지능 (AI)을 사용하여 승객과 물건을 운송 가능케한다. 신기술을 다루고 더 나은 성과를 내고 안전을 개선하며 현대식으로 유지하기 위해 엘리베이터의 중요 부분을 업그레이드하고 있다. IoT가 가능한 엘리베이터는 에너지 효율 기능을 표시하고 대기 시간을 줄이며 모바일 애플리케이션을 통해 서비스 제공업체와 통신한다.



최근에는 엘리베이터 시장에서 많은 기술 발전이 이루어지고 있다. 호텔, 병원, 주차 건물, 상업, 주거 및 산업 분야에서 IoT 엘리베이터를 많이 사용한다. 따라서 엘리베이터 시장에서의 IoT는 향후 빠른 속도로 확대 될 것으로 예상된다. 전세계의 현대 소비자 동향과 함께 새로운 IT 솔루션을 채택할 필요성이 커지면서 IoT 엘리베이터에 대한 수요가 증하고있다. 이는 예측 전망 기간 동안 시장 성장 추진 요소로 보여진다. 또한 건설 산업에서 안전하고 전력 효율적인 기술에 대한 수요

가 증가함에 따라 시장의 성장이 촉진 될 것으로 기대된다. 그러나 높은 초기 투자는 글로벌 시장 성장의 저해 할 것으로 예측된다. IoT 엘리베이터 시장은 2017년에 134억 9천만 달러에 이르렀으며 예측 전망 기간 동안 16.1%의 연평균 성장률과 함께 2026년에는 507억 6천만 달러에 달할 것으로 전망된다.

구성 요소를 기반으로 IoT 엘리베이터 시장은 하드웨어, 소프트웨어 및 서비스로 분류된다. 하드웨어 부문은 2017년 전 세계적으로 상장한 시장 점유율을 차지했다. 이 부문은 예측 전망 기간 동안 상당한 시장 점유율을 유지할 것으로 예측된다. 사고를 예방하기 위해 스마트 엘리베이터에 원격 모니터링 시스템을 설치해야 할 필요성이 커지고 있다. M2M 게이트웨이 또는 엘리베이터 게이트웨이는 리프트 컨트롤러와 원격 모니터링 사이트 간의 안전한 통신을 위해 엘리베이터에서 설계 및 개발되었다. 서비스 기간은 예측 전망 기간 동안 빠른 속도로 확대 될 것으로 예측된다. 그러나 리퍼 비스 서비스 서브 세그먼트는 선진국의 상업 및 주거 부문에서 엘리베이터 현대화에 대한 관심이 커지면서 예측 전망 기간 동안 엄청난 성장을 보일 것으로 예측된다. 반면 소프트웨어 구정 요소는 분석 소프트웨어, IoT 플랫폼 및 보안 소프트웨어의 사용 증가로 인해 수요가 급증 할 것으로 예측된다. 클라우드 기반 하위 서비스는 2017년 시장 점유율 1위를 차지했으며, 클라우드 기반 서비스를 통해 사용자가 인터넷에 여러 리소스에 액세스 할 수 있기 때문에 예측 전망 기간 동안 크게 확장 될 것으로 예측된다. 더 많은 유연성과 확장성을 제공하고 IT 관련이 거의 없이 모든 제품 업데이트를 정기적으로 제공한다.

응용분야를 기준으로 엘리베이터의 예방 유리 보수 응용프로그램은 2017년에 시장 점유율을 주도하여 원격 모니터링을 실시했으며 예측 전망 기간 동안 그 위치를 유지할 것으로 예측된다. 예방 유지 보수는 엘리베이터의 효율성을 극대화하고 엘리베이터 비용을 줄이는데 도움이 된다. 그러나 원격 모니터링 어플리케이션 부문은 스마트 엘리베이터 유지 보수를 향상시키고 고객에게 서비스 중단을 줄이기 때문에 2018년에서 2026년까지의 예측 전망 기간 동안 상당한 속도로 확장 될 것으로 예상된다.

최종사용자를 기반으로 IoT 엘리베이터는 거주지, 상업 및 산업으로 분류할 수 있다. 상업 부문을 엘리베이터 부문에서 주거 부문이 뒤 따르며 주거 부문은 예측 전망 기간 동안 빠른 속도로 확장 될 것으로 예측된다. 주거 부문은 더 높은 수준의 사용을 목격할 것으로 예상되므로 많은 잠재 고객을 보유하고있다.

북미 시장은 본 지역의 기존 사용자가 많이 때문에 미래 수익에 크게 기여할 것으로 예측된다. 북미와 유럽은 사용자 사이의 기술 인지도 측면에서 다른 지역보다 앞서 나가고 있다. 이는 다른 지역의 시장 점유율을 감소 시킬 것이다. 또한 아시아 태평양, 남아메리카, 중동 및 아프리카 지역의 시장은 향후 연평균 성장률이 확대 될 것으로 예측된다.

엘리베이터 시장에서 IoT가 점차 확대되면서 많은 소형 및 대형 공급업체가 엘리베이터 유지 보수를 개선하고 사고 위험을 줄이기 위해 IoT 엘리베이터에 투자하고 있다. 연구 및 개발의 제품 혁신 및 업그레이드는 끊임없이 일어나고 있다. 예를 들어, 2018년 5월 Otis Elevator Company는 세계적으로 고층 건물을 대상으로 새로운 인테리어, 스마트 및 연결 기능, 세련된 외관 및 더 많은 기능을 비롯한 혁신적인 기능을 갖춘 최초의 고속 Gen2® 엘리베이터를 출시했으며, 사업을 확장해 나아가고 있다.

IoT 엘리베이터 시장의 주요 참여 업체에는 ThyssenKrupp AG, KONE Corporation, Otis Elevator Company, Schindler Group, Mitsubishi Electric Corporation, 그리고 Toshiba Elevators이 있다.

본 시장은 아래와 같이 세분화 되어있다:

글로벌 IoT 엘리베이터 시장
부품별

- 하드웨어 (M2M 게이트웨이/엘리베이터 게이트웨이)
- 소프트웨어
  - 직접 설치
  - 클라우드
- 서비스
  - 디자인 및 엔지니어링
  - 설치
  - 재정비
  - 유지 보수
  - 관리 서비스

응용분야별

- 예방 정비
- 원격 모니터링
- 보고 기능
- 연결 관리
- 기타 (콜 관리)

지역별

- 거주지
- 상업
- 산업

지역별

- 북미
  - 미국
  - 캐나다
  - 그 외
- 유럽
  - 독일
  - 영국
  - 프랑스
  - 그 외
- 아시아 태평양
  - 중국
  - 일본
  - 인도
  - 그 외
- 중동 및 아프리카
  - GCC 국가들
  - 남아프리카
  - 그 외
- 남미
  - 브라질
  - 그 외

목차

❑ 보고서 문의

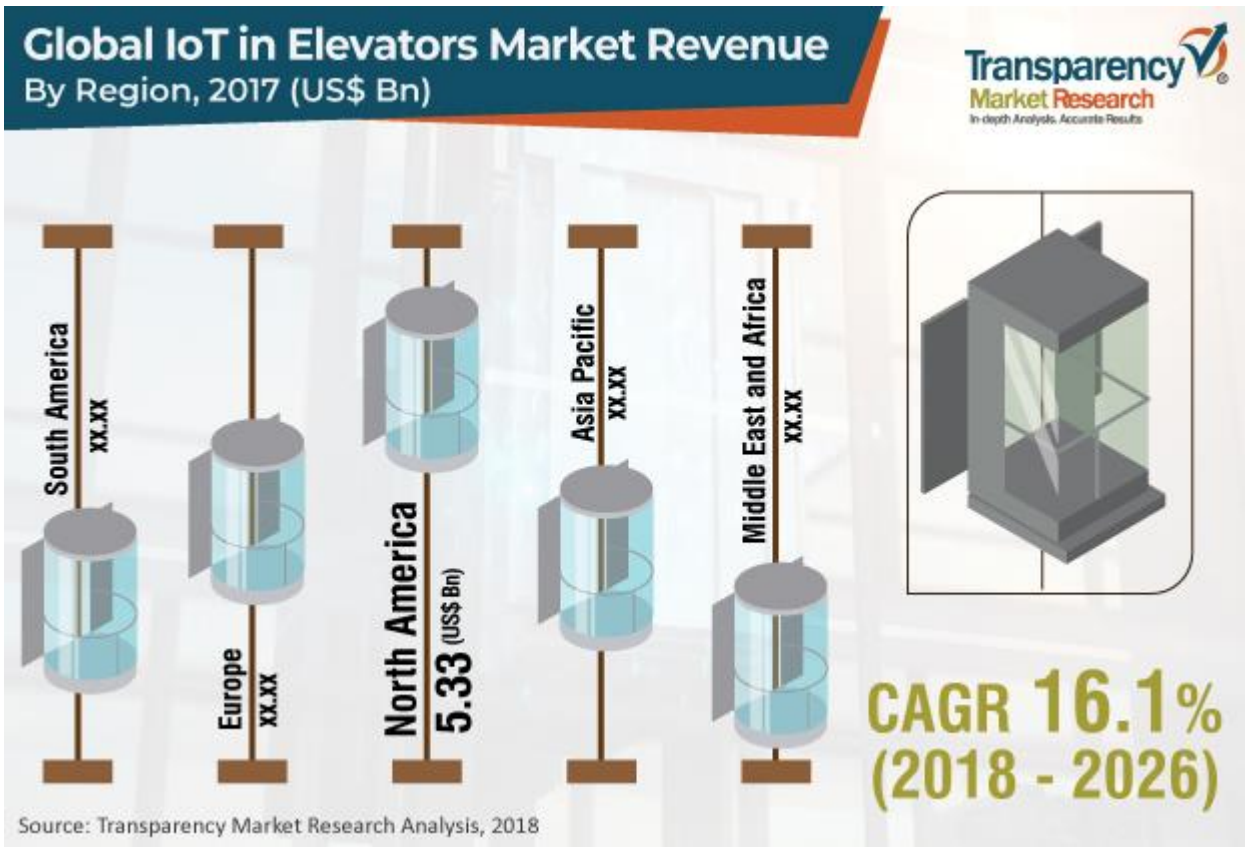
IoT in Elevators Market (Component - Hardware, Software, Services; Application - Preventive Maintenance, Remote Monitoring, Advanced Reporting, Connectivity Management; End user - Residential, Commercial, Industrial) - Global Industry Analysis, Size, Share, Growth, Trends, and Forecast 2018 - 2026

Publisher: Transparency Market Research / Date: 2019-01-01 / Page: 230 / Price: Single User PDF; $5,795

Summary

IoT in Elevators Market - Snapshot

IoT enabled elevators make use of artificial intelligence (AI) to enable vertical transportation of passengers and commodities. It is a process of upgrading the critical parts of the elevator in order to handle new technology, perform better, improve safety, and ensure the aesthetics are up to date. IoT enabled elevators display features of energy efficiency, reduce waiting time, and communicate with service providers via a mobile application.



In recent times, many technological advancements have taken place in the IoT in elevators market. Hotels, hospitals, parking buildings, and the commercial, residential, and industrial sector widely use

IoT in elevators. Therefore, the IoT in elevators market is expected to expand at a rapid pace in the coming years. Growing need to adopt new IT solutions with modern consumer trends across the world is driving demand for IoT in elevators. This is anticipated to drive the market over the forecast period. Moreover, increasing demand for safe and power efficient technologies from the construction industry is expected to fuel the growth of the market in the near future. However, high initial investment is anticipated to hinder the growth of the market across the world. The IoT in elevators market is likely to reach a value of US$ 50.76 Bn by 2026 from US$ 13.49Bn in 2017, expanding at a CAGR of 16.1% during the forecast period.

Based on component, the IoT in elevators market can be segmented into hardware, software, and services. The hardware segment accounted for a significant market share globally in 2017.This segment is projected to maintain a significant market share over the forecast period. There is a rising need to install elevator remote monitoring systems in smart elevators to prevent accidents. M2M gateway or elevator gateway are designed and developed in elevators for secure communication between the lift controller and remote monitoring sites. The services segment is estimated to expand at a rapid pace during the forecast period. Services segment is further divided into designing & engineering, installation, refurbishing, maintenance & repair, and managed services. Installation accounted for major market share in 2017 and is anticipated to maintain its leading position over the forecast period. However, refurbishing services sub-segment is expected to witness tremendous growth over the forecast period due to growing attention toward elevator modernization in the commercial and residential sector across developed regions. On the other hand, the software component is expected to witness prominent demand due to rising application of analytics software, IoT platforms, and security software. Cloud software sub-segment accounted for leading market share in 2017 and is expected to expand significantly during the forecast period, as cloud-based services enable users to access several resources with the help of the Internet. It provides more flexibility and scalability and delivers product updates more regularly with little to no IT involvement.

On the basis of application, preventive maintenance application in elevators accounted for leading market share in 2017 followed by remote monitoring, and is expected to retain its position over the forecast period. Preventive maintenance maximizes the efficiency of elevator’s, and helps to reduce elevator costs. However, remote monitoring application segment is expected to expand at a significant pace over the forecast period from 2018 to 2026 as it improves smart elevator maintenance and reduces the disruption of service to customers.

Based on end-user, the IoT in elevators market can be categorized into residential, commercial, and industrial. The commercial sector is the prominent user of IoT in elevators followed by the residential sector, while the residential sector is projected to expand at a rapid pace over the forecast period. Residential sector is projected to witness higher level of adoption, thereby creating a high potential customer base.

The market in North America is anticipated to contribute significantly to revenue in the near future due

to a large base of existing users in the region. North America and Europe are mature regions of the IoT in elevators market in terms of technical awareness among users. This is likely to contribute to the decline in market share of these regions. Furthermore, the market in APAC, South America and Middle East & Africa is likely to expand at a robust CAGR in the coming years.

Attracted by the increasingly expanding IoT in elevators market, many small and large scale vendors are investing in IoT in elevators in order to improve elevator maintenance and reduce the chances of accidents. Product innovation and upgrade of research and development are constantly taking place in the IoT in elevators market. For instance, in May 2018, Otis Elevator Company launched its first high-speed Gen2® elevator, equipped with innovative features including a new interior, smart & connected functionality, fashionable look, and higher functionality, for the global high-rise market, expanding its popular Gen2 family of elevators.

Prominent players identified in the IoT in elevators market and profiled in the study include ThyssenKrupp AG, KONE Corporation, Otis Elevator Company, Schindler Group, Mitsubishi Electric Corporation, and Toshiba Elevators.

IoT in Elevators Market: Overview

This comprehensive report titled IoT in Elevators Market-Global Industry Analysis, Size, Share, Growth, Trends, and Forecast, 2018 – 2026, by Transparency Market Research analyzes and provides growth forecast for the IoT in elevators market at the global and regional level. In terms of region, the market has been classified into North America, Europe, Asia Pacific, Middle East & Africa, and South America. The report provides analysis for the period 2016–2026, wherein 2018 to 2026 is the forecast period and the base year is 2017. An in-depth and unbiased market assessment has been made to offer readers insightful and accurate analysis. The report emphasizes on all the major trends and services that play a key role in the expansion of the IoT in elevators market between 2018 and 2026. It also focuses on market drivers, restraining factors, and opportunities of the IoT in elevators market during the forecast period.

The report includes a detailed value chain analysis and opportunity analysis, which is focused on providing anextensiveview of the global IoT in elevators market. Porter’s Five Forces analysisis also provided to understand the competitive scenario in the market. The study incorporates IoT in elevators market attractiveness analysis, in which market segments based on componentsuch as hardware, software, and services are benchmarked based on their market size, growth rate, and attractiveness in terms of opportunity.In order to provide a complete analysis of the overall competitive scenario in the IoT in elevators market, attractiveness analysis of every geographic region mentioned in the reporthas been provided.

An overview of the IoT in elevators market detailing key trends and dynamics has been included to

providea clear understanding of market driving forces. The dynamics include impact analysis of market drivers, restraining factors, and opportunities of the IoT in elevators market. Additionally, the report provides analysis of business strategies adopted by market leaders in the IoT in elevators market. Trends and services related to IoT in elevator systems along with their applications have also been explained in the report.

Global IoT in Elevators Market: Scope of the Report

The study provides a decisive view of the global IoT in elevators market, broadly segmentedbased on componentinto hardware, software, and services; based on application into preventive maintenance, remote monitoring, advanced reporting, connectivity management, and others; and in terms of end-user into residential, commercial, and industrial. Further, the report provides a detailed breakdown of the IoT in elevators market across geographic regions, which include North America, Europe, Asia Pacific, Middle East & Africa, and South America, thus providing valuable insights at the micro and macro levels.

The report highlights the competitive scenario within the IoT in elevators market, ranking all the major players according to key recent developmentsand their geographic presence. The insights into the IoT in elevators market are a result of our extensive primary interviews, secondary research, and in-house expert panel reviews. Thesemarket estimates have been analyzed byconsidering the impact of differenteconomic, political, social, legal,and technological factors.

The market in North America has been segmented into the U.S., Canada, and Rest of North America. Furthermore, the market in Europe has been analyzed across France, Germany, the U.K., and Rest of Europe. The IoT in elevators market in Asia Pacific has been segmented at country level into China, Japan, India, and Rest of Asia Pacific. The Middle East & Africa region covers GCC countries, South Africa, and Rest of Middle East & Africa. Similarly, South America includes Brazil and Rest of South America. This report provides all the strategic information required to understand the IoT in elevators market along with component, application, and end-user.

Global IoT in Elevators Market: Research Methodology

The research methodology is a perfect combination of primary research, secondary research, and expert panel reviews. Secondary sources such as annual reports, company websites, SEC filings and investor presentations, internal and external proprietary databases, statistical databases, relevant patent and regulatory databases, market reports, government publications, World Bank database, and industry white papers are usually referred to for developing a preliminary understanding of the market.

Primary research involves telephonic interviews, e-mail interactions, and face-to-face interviews for detailed and unbiased reviews of the IoT in elevators market across geographies. Primary interviews are usually conducted on an ongoing basis with industry experts and participants in order to obtain the latest market insights and validate existing data and analysis. Primary interviews offer new and fresh

information on important factors such as market trends, market size, competitive landscape,growth trends, etc. These factors help validate and strengthen secondary research findings. Moreover, the data collected and analyzed from secondary and primary research is again discussed and examined by our expert panel.

Global IoT in Elevators Market: Competitive Dynamics

The research study includes profiles of major companies operating in the global IoT in elevators market. Market players have been profiled in terms of attributes such as company overview, financial overview, business strategies, and recent developments. Parameters such as investment and spending and developments by major players of the market are tracked. Some of the key players in the IoT in elevators market are ThyssenKrupp AG, KONE Corporation, Otis Elevator Company,Schindler Group, Mitsubishi Electric Corporation, and Toshiba Elevatorsamong others.

The IoT in elevators market has been segmented as follows:

Global IoT in Elevators Market

By Component

- Hardware(M2M Gateway/Elevator Gateway)
- Software
    - On-premise
    - Cloud
- Services
    - Designing & Engineering
    - Installation
    - Refurbishing
    - Maintenance & Repair
    - Managed Services

By Application

- Preventive Maintenance
- Remote Monitoring
- Advanced Reporting
- Connectivity Management
- Others (Call Management)

By End-user

- Residential
- Commercial
- Industrial

By Geography

- North America
    - The U.S.

- Canada
- Rest of North America

- Europe
  - Germany
  - The U.K.
  - France
  - Rest of Europe
- Asia Pacific
  - China
  - Japan
  - India
  - Rest of Asia Pacific
- Middle East & Africa
  - GCC Countries
  - South Africa
  - Rest of Middle East & Africa
- South America
  - Brazil
  - Rest of South America

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