Market study

KNX Room Control Devices from hybrid to full touch display

Preface

The markets for smart buildings and sustainable building technologies are undergoing dynamic change. Technological innovations, increasing energy efficiency requirements and new user expectations are fundamentally changing the rules of the market.

In this environment, companies are increasingly faced with the challenge of aligning their strategies, products and business models for the future.

The added value for my clients – and also the approach of this study – lies in a holistic view:

Strategic, technological and operational. With a clear focus on sustainable value creation and practical feasibility.

This market study is intended to provide guidance for decision-makers:

- What are the key growth drivers in the field of smart & sustainable building?
- Which technological developments will shape the market?
- How can companies align their strategies, products and partnerships with this?

I invite you to use the results of this study as inspiration and a tool – to make informed decisions, identify opportunities and actively shape the future of your company.

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1. Introduction

1.1 Objective

The aim of this market study is to comprehensively analyse the current market conditions and future development potential for KNX display room control devices in the DACH region. First, the market volume is recorded, growth rates and trends are examined, and the relevant market segments – such as residential, commercial, high-end, smart home, renovation and new buildings – are considered separately. A particular focus is placed on identifying and analysing the most important competitors. Their product features, such as functionality, design, price and distribution, are examined in detail, their unique selling propositions (USPs) are highlighted and their respective market positioning is evaluated in order to derive competitive advantages and potential market niches.

In addition, the technical and functional requirements for future products are systematically recorded.

This includes the necessary control functions (e.g. lighting, shading, climate control, scene control, visualisation), relevant connectivity options (KNX TP, RF, powerline, IP/IoT, app connection) and innovative additional features such as sensors or colour change. In addition, technical specifications, installation guidelines and compatibility requirements are examined to ensure market-compliant product development. User requirements in terms of display size, readability, ease of use and innovative control options – for example, through tactile or gesture-based control panels – are also taken into account.

Another focus is on the analysis of customer profiles and purchasing decision-making processes. This involves defining buyer personas such as integrators, electricians or builders and identifying key value drivers. Targeted marketing and sales strategies can then be developed on this basis. In addition, potential sales channels, partnerships and distribution channels that are important for a successful market launch and subsequent scaling of the product are evaluated.

1.2 Delimitation of the study area

This study examines the German market for KNX multifunction display control devices up to and including a size of 5 inches, as these display sizes can still be installed in VDE standard flush-mounted boxes in some cases. The aim is to evaluate market volume, growth opportunities and competitive structures in the selected product/market segment. The study considers products with displays that are used in smart homes and buildings for the central control of rooms or central commands.

The following are not included in the analysis:

- Control devices from other building automation standards (e.g. Zigbee, DALI, Modbus, etc.), classic switch series without displays and end consumer products. The geographical focus is on Germany and the DACH region; international trends are used for contextualisation purposes only.
- Control devices from other proprietary smart home systems such as Busch-free@home, Basalte Home, Wiser Home, etc.
- Products that, according to the manufacturer, are already being phased out, e.g. ekinex Touch & See, SIEMENS TouchControl4, Schneider Electric Mini Touch, etc.
- Regulatory requirements such as CE marking, TÜV, KNX certification, EMC, fire protection and installation standards.

1.3 Methodology & data collection

Desk research:

- Systematic evaluation of existing and current sources (specialist studies, market reports, manufacturer documents, industry portals, etc.) and analysis using product management methodologies.
- Analysis of competitive offerings and industry trends to derive market volume, structures, growth potential and innovation dynamics.

Expert interviews:

- Qualitative survey of installers, system integrators and industry experts using semi-structured guidelines.
- Deepening of desk research results through first-hand brand, product and market knowledge.

Advantages of the combined methodology:

- Broad, fact-based overview thanks to desk research.
- Practical, detailed insights through expert interviews.
- Higher validity of results through comparison of different sources of information.