



IoT产业与智能家居在中国的发展趋势

IoT Industry and Development Trend of Smart Home in China

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中国智能家居市场发展历程

Development History of Chinese Smart Home Market



2000-2005

蓄势发展期
Poised
Development



2008-2012

厂商关注期
Manufacturer
Concern



2014-2016

生态圈构建期
Ecosphere
Construction



2000年以前
Before 2000

概念形成期
Concept
Formation



2005-2008

市场摸索期
Market
Exploration



2012-2014

智能创客期
Smart Home
Mak-er



智能家居整体受关注度呈现出逐年上涨趋势

The Overall Attention of Smart Home Shows an Upward Trend Year by Year

互联网平台关注

Internet platform concerns

创新创业热潮

Innovation & business startups boom

政策层面利好

Policy level positive

传统企业转型升级

Transformation of traditional enterprises

集成商群体壮大

System integrators grow

数据来源：百度指数 2006-2017
Data source: Baidu index

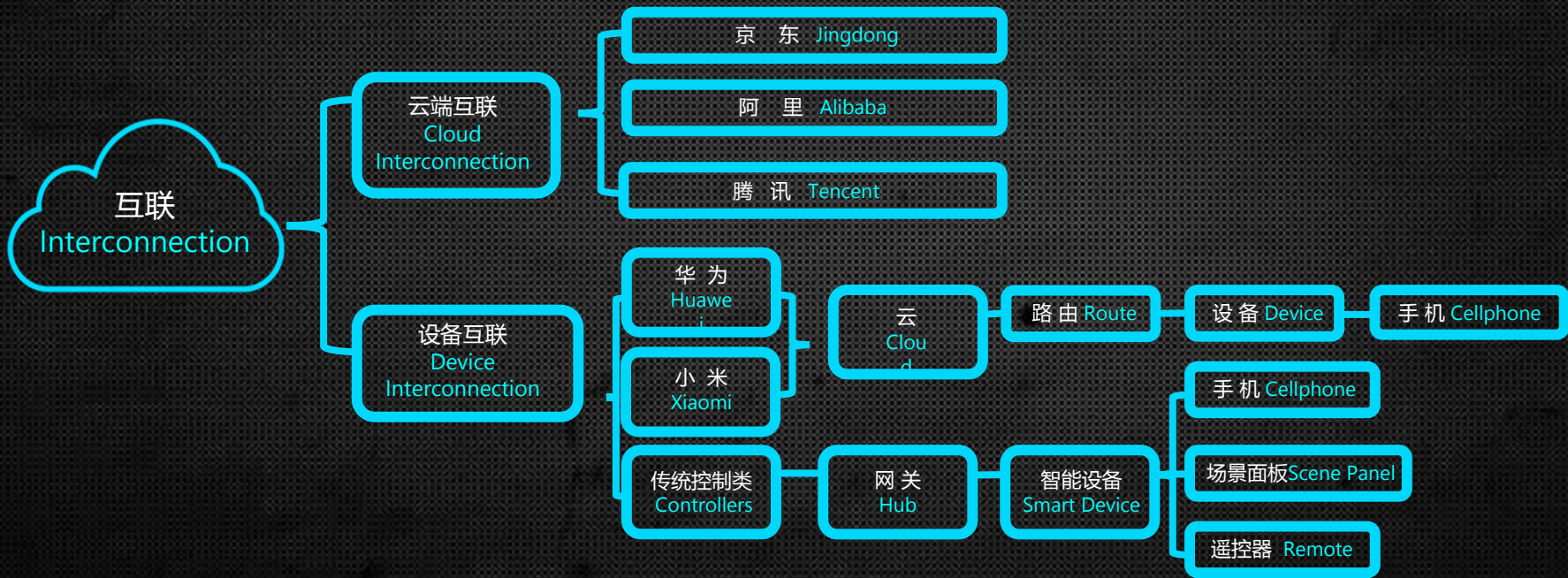


智能家居市场进入新一轮快速发展期

Smart home market has entered a new round of rapid development

中国智能家居产业互联生态

Interconnection Ecosystem of Smart Home in China



中国智能家居市场竞争格局分析

Analysis of Competition Pattern of Chinese Smart Home Market



Legrand ABB Schneider
鸿雁(HONYAR) Control4 Crestron
Savant AMX HDL 杜亚(DOOYA)

多关注于前装集成项目市场的照明电工企业、智能中控类企业、总线及无线控制及配套第三方企业
Pay more attention to lighting, electrical engineering enterprises, intelligent central control enterprises, bus and wireless control and supporting third party enterprises in front of the integrated project market

传统控制、电气类企业
Traditional control and electrical enterprises



Jingdong Alibaba Xiaomi QQ物联(QQ Connect) 微信(WeChat)乐视(Letv) 华为(HUAWEI) 中兴(ZTE) 魅族(MEIZU) 360

互联网及平台企业
Internet platform enterprise

延伸产业链布局，搭建统一平台，构建生态圈
Extend the layout of the industrial chain, build a unified platform, build ecological circle



BroadLink 绿米(LVMI)
控客智能(KONKE) 欧瑞博(ORVIBO)

通过智能单品完成概念导入和用户积累，进而以更多配套产品及模块构建系统
Through intelligent single product concept import and user accumulation, and then to more supporting products and modules to build systems

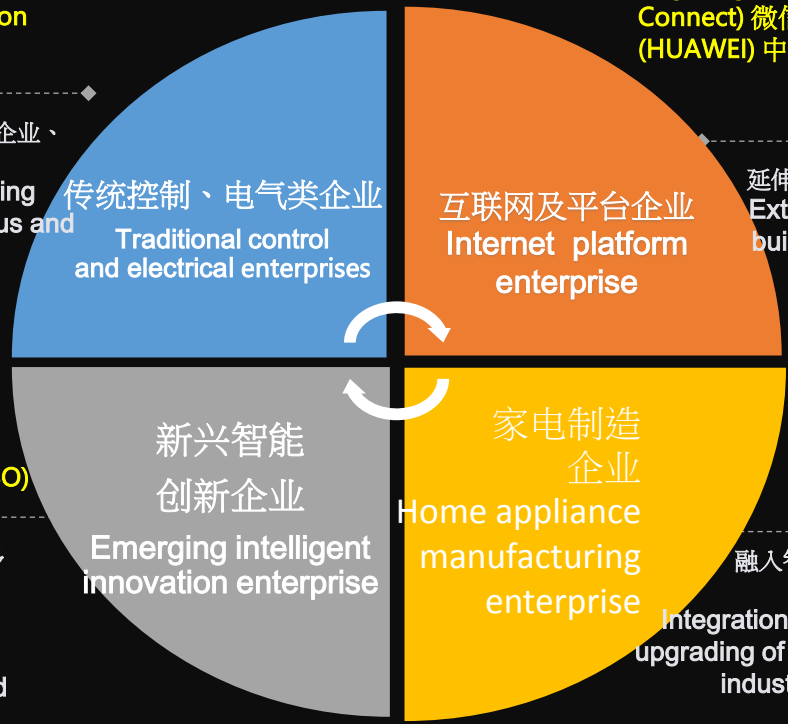
新兴智能
创新企业
Emerging intelligent innovation enterprise



Haier U+ Midea M-Smart TCL, Galanz

家电制造企业
Home appliance manufacturing enterprise

融入智能化功能、推进传统家电产业升级，构建智慧生活生态
Integration of intelligent functions, and promote the upgrading of traditional household electrical appliances industry, and build a smart living ecology



中国智能家居产业链分布

Chinese Smart Home Industry Chain Distribution

上游：芯片商、模块商、解决方案

Upstream: chip maker, modules, solutions providers

与上游IoT产业紧密关联

Closely related to upstream IoT industry

中游：设备商、软件服务商

Midstream: equipment providers, software service providers

互联网企业、家电企业、传统控制类企业、新兴智能控制企业

Internet companies, household electrical appliance enterprises, traditional control enterprises and emerging intelligent control enterprises

下游：代理商、集成商、经销商

Downstream: agents, integrators, distributors

三者定位存在交叉现象

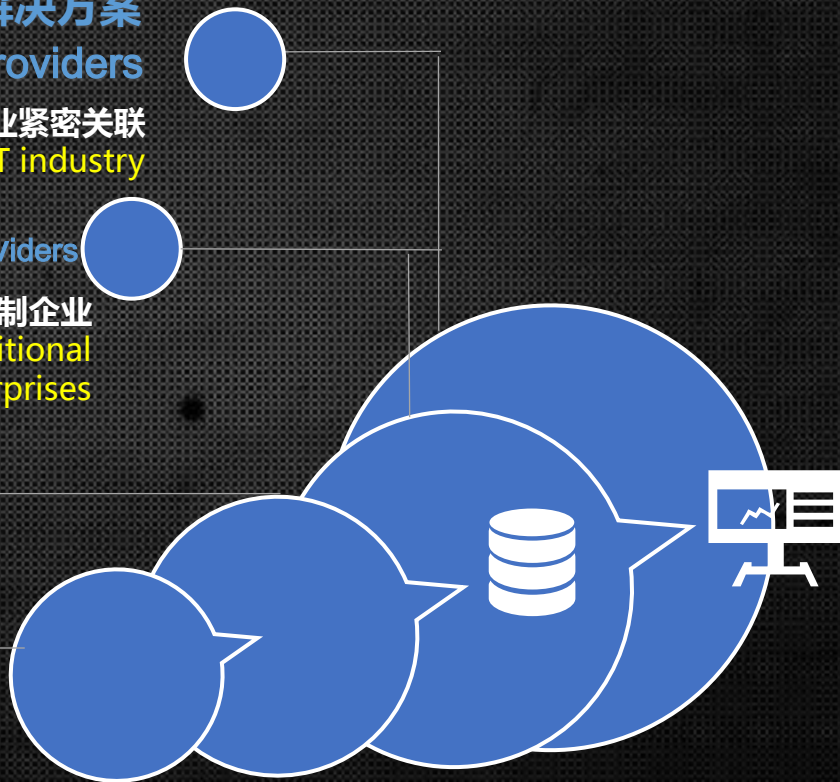
There is cross phenomenon in the orientation of the three

用户端：行业用户、个人用户

Client: industry users, individual users

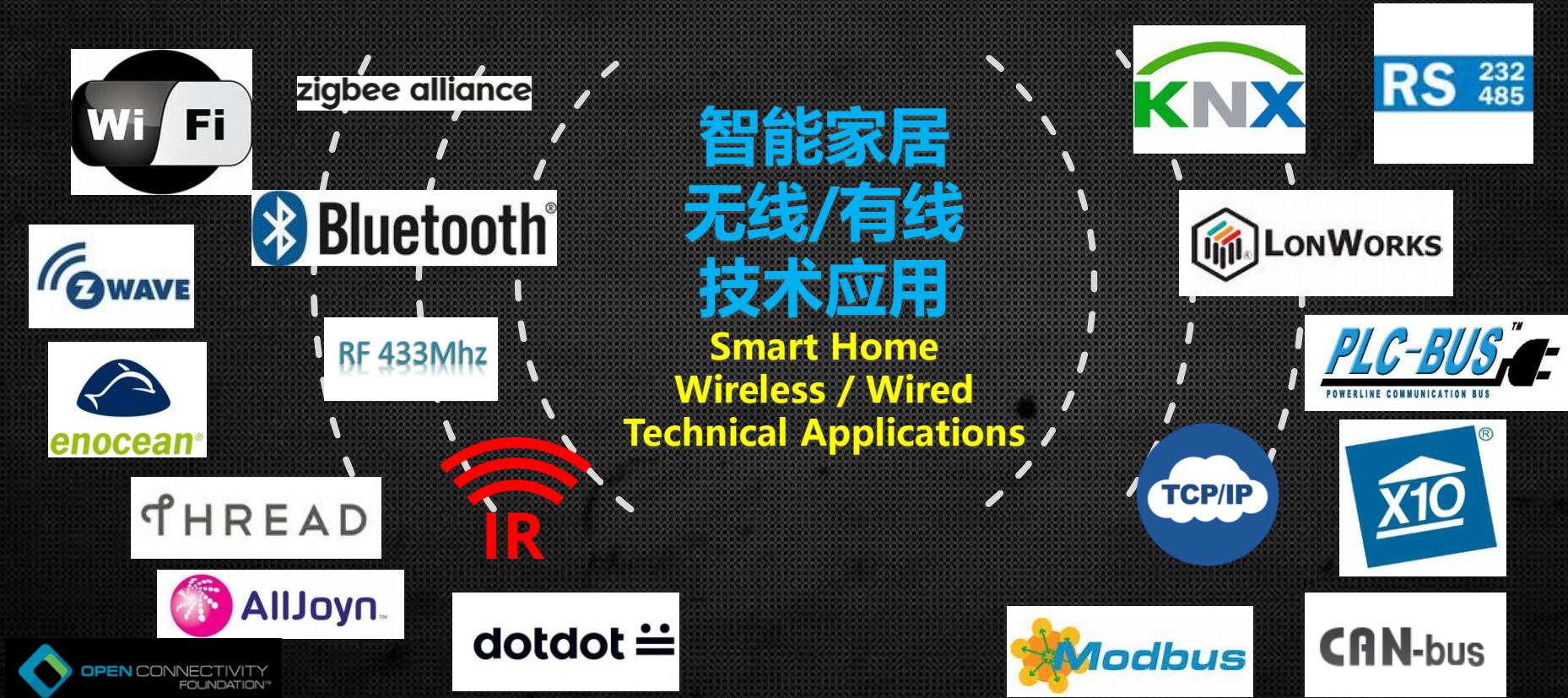
装饰公司、房地产开发商弱电总包商、酒店方、别墅用户、平层用户

Decoration company, real estate developer, weak general contractor, hotel side, villa users, flat users



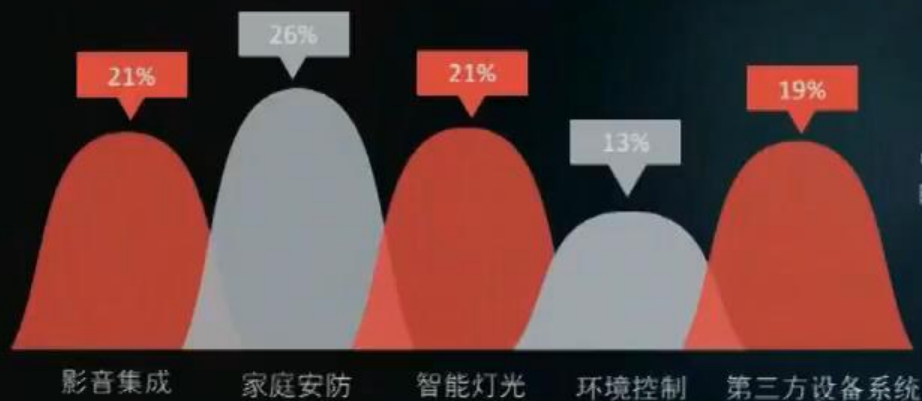
中国智能家居技术应用

Application of Smart Home Technology in China

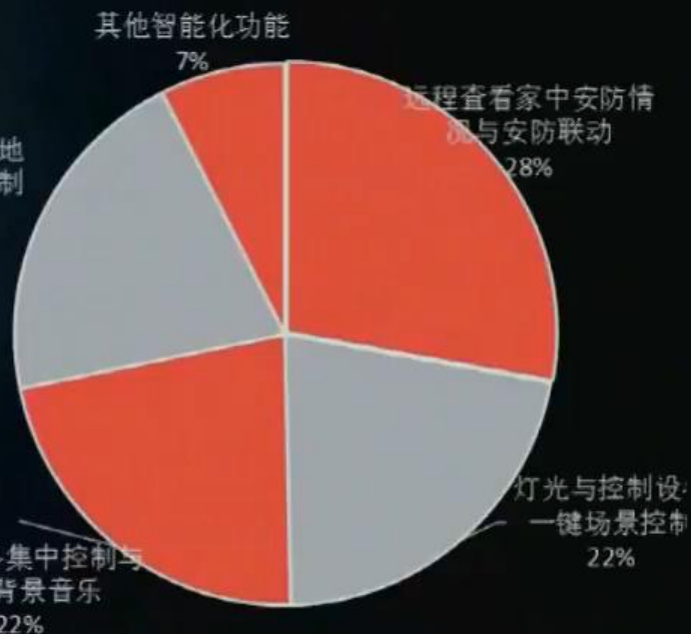


中国智能家居集成与消费市场发展

China Smart Home Integration
&
Consumer Market Development



中央空调新风地
暖设备智能控制
21%



不同于家庭安防大都依赖于对第三方产品的集成，影音集成和智能灯光是目前智能家居集成商市场厂商的重点发力方向，大部分智能家居集成商集中于此。

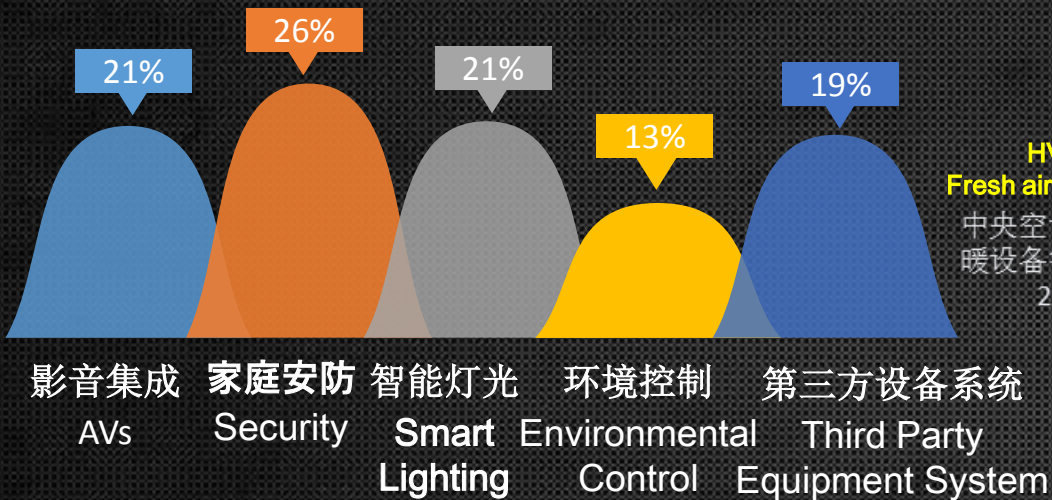


消费主张



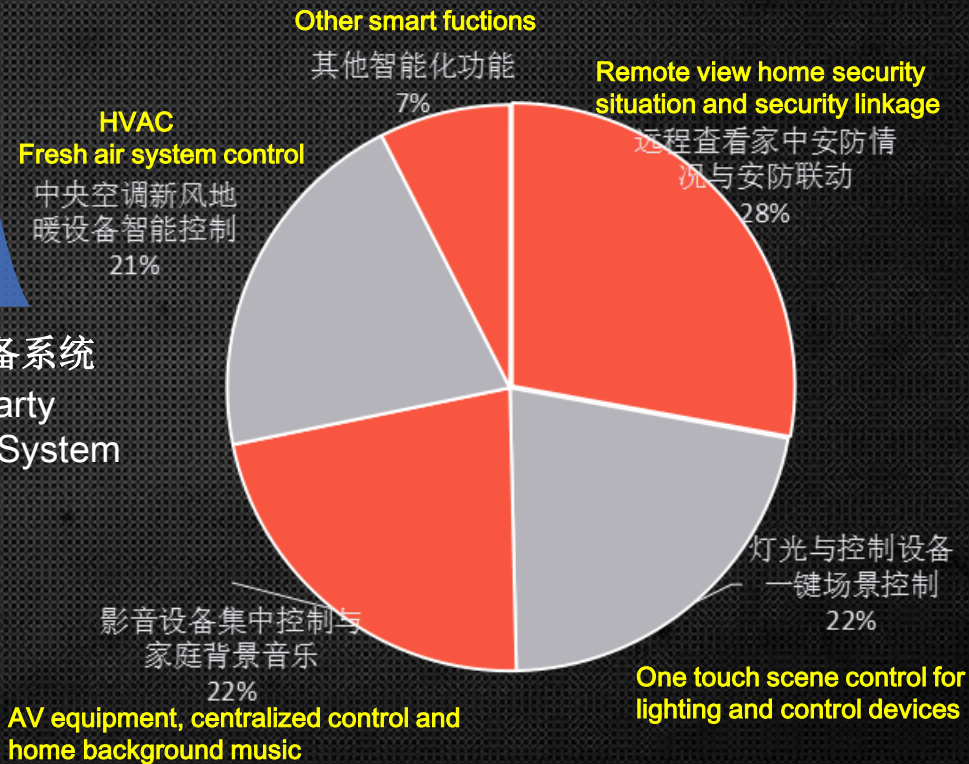
现阶段中国用户接受度较高的智能家居集成功能与场景

Smart Home Integration Features and Scenes with Higher Acceptance of Users in China



不同于家庭安防大都依赖于对第三方产品的集成, 影音集成和智能灯光是目前智能家居集成商市场设备厂商的重点发力方向, 大部分智能家居集成设备厂商的产品关注点主要也集中于此。

Home security is rely on the integration of third party products, but the direction of most Chinese smart home devices manufacturers are focus on AVs integration and smart lighting.



中国用户可以接受的智能家居系统平均造价

Average cost of smart home system acceptable to Chinese users

在单位面积中，智能化系统所占比例并不显眼

In the unit area, the proportion of the smart home system is not conspicuous.

集成项目中，单位面积中智能系统的造价比往往存在走高的可能性

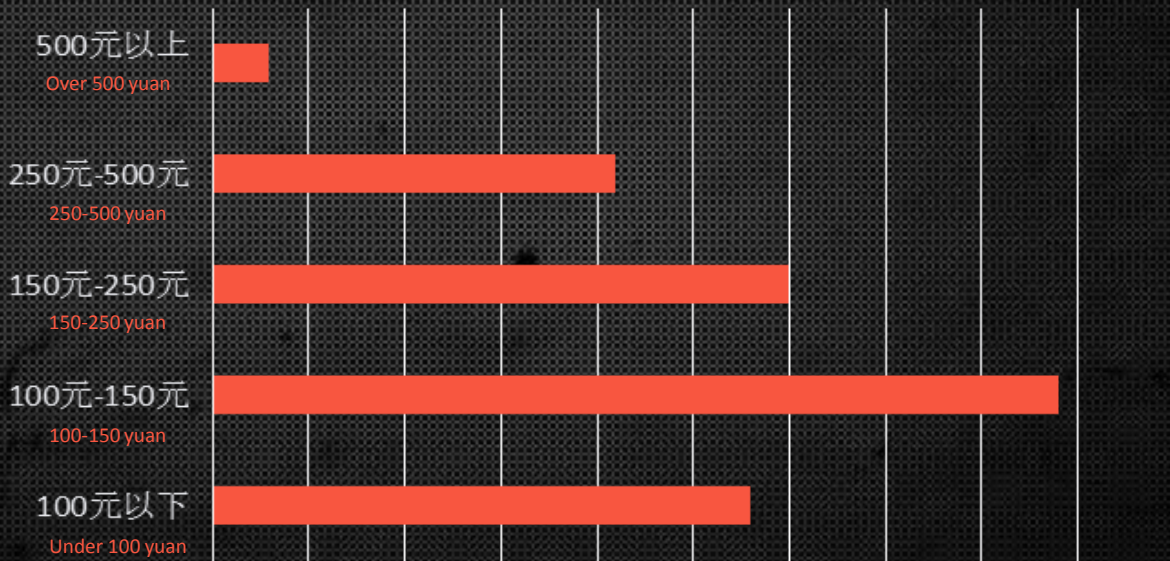
In the integration project, the cost ratio of intelligent system in unit area often has the possibility of increasing.

酒店项目市场与精装房市场，由于规模化应用，在很大程度上会拉低单位面积造价比

Hotel project market and hardcover room market, due to large-scale applications, to a great extent will lower the cost per unit area.

Average cost (per square meter)

平均造价（每平方米）



中国智能家居用户需求分析

Analysis of User Demand For Smart Home in China



- 市场上各种宣传影响

Various Publicity Influences in Chinese Market

- 智能家居多系统属性特质

Multi System Attributes in Smart Home Industry

- 前装集成市场与后装消费市场差异

Difference in Pre Installed Integrated Market and Post Installed Consumer Market



功能场景
Functional
Scenes



装修预算比
Decoration
Budget Ratio



消费诉求
Consumer
Appeals



操控习惯
Operating
Habits



价格因素
Price Factors

An aerial night view of a modern city square. The buildings are illuminated with various colors, and the square is filled with people walking. The text is overlaid on the center of the image.

中国智能家居趋势走向

The trend of smart home in China

中国智能家居趋势走向

The Trend of Smart Home in China

从**控制**到**内容**

From **CONTROL** to **CONTENT**

从**系统**到**生态**

From **SYSTEM** to **ECOSPHERE**

从**智能家居**到**智慧家庭**

From **SMART HOME** to **INTELLIGENT FAMILY**

从智能家居到智慧家庭

From Smart Home to Intelligent Family

以**控制**为**中心**

Take **CONTROL** as **CENTER**

以**住宅**为**载体**

Take **RESIDENCE** as **VEHICLE**

多**设备互联**的**控制集中化**

CONTROL DEVICES

centralized

INTERCONNECTION

以**内容**为**中心**

Take **CONCENT** as **CENTER**

以**用户**为**载体**

Take **USERS** as **VEHICLE**

以**效果为导向**的**交互多元化**

INTERACTIVE DIVERSIFICATION

based on

EFFECTIVENESS

中国智能家居趋势走向

The Trend of Smart Home in China

智能社区体系化解决方案和客户数据反哺

Intelligent Community System Solution and Customer Data Feedback

驱动酒店科技创新与数字化转型

Drive Hotel Technological Innovation and Digital Transformation

运营商加速布局智慧家庭业务

Telecom operators to Accelerate the Intelligent Family Business

探索合作共赢的新商业模式

Explore a New Business Model of Win-Win Cooperation

趋势关键词 Trend Keyword



全宅集成仍然存在集中于特需小众市场
The whole house is still focused on
the integration of special niche
market

家庭中心会被区域场景所替代
Family centers will be replaced by
regional scenes
技术连接将呈现多样性
Technical connections will show
diversity



区域场景构建以产品为中心
Regional scene construction
is product centric
载体从住宅转为本
The vehicle shifted from residential to
humanistic
跨行业各品类有效整合
Effective integration across industries and
categories



人力成本倒逼服务整合
Human cost forces service integration
系统特殊性呼唤优秀集成服务商
System specificity needs excellent integrated
service providers
有效整合避免资源浪费
Effective integration to avoid waste of
resources

互联网企业 Internet Enterprise

内容层、云服务、数据分析与输出
Content layer, cloud services, data analysis and output

设备商 Device Manufacturers

产品品质、系统稳定性、用户需求
Product quality, system stability, user requirements

运营商 Telecom Operators

基础网络、管道建设、服务内容植入
Basic network, construction, service content implantation

集成服务商 System Integrator

服务价值提炼、体验，销售，服务一体化
Service value refinement, experience, sales, service integration



中国智能家居产业联盟 CSHIA

China Smart Home Industry Alliance



VillaKit技术组 | P2C技术组 | 高校人才工作组 | 传感器工作组 |
 交易中心工作组 | 汉语言语音工作组 | 家庭网络安全工作组 | 智慧酒店工作组
 VillaKit Technology Group | P2C Technology Group | College Talents Working Group
 Sensor working group | Trading Center Working Group | Chinese language and speech Working Group
 Home networking security working group | Smart hotel working group

智能家居干货分享 尽在智能头条

智能家居行业伙伴专属资讯客户端



立即体验



感谢倾听

Thanks !