

Connected Home Service



About LCP Delta



Our mission is to enable a better, faster energy transition for all

Founded in 2004 and based across the UK, France, Norway, the Netherlands and beyond, LCP Delta provide data-driven research, consultancy, technology products and training services to companies investing in and navigating the energy transition.

We are a diverse team from a variety of backgrounds including engineers, data analysts, environmentalists and more.

LCP Delta is a mission driven organisation - all of us want to make a difference to the energy transition and accelerate the path to a low carbon future.

The energy market is becoming increasingly complex. As consumers become more empowered and as energy systems around the world decarbonise, there is a need to understand both the generation and demand side to effectively navigate the rapid changes occurring.

We know it's a complicated topic, and we're here to help.

Andy Bradly, Partner, LCP Delta

LCP Delta was formed through the merger of Delta-EE and LCP Energy to bring together deep generation and consumer-side expertise, to provide our clients with a single partner to help them on their journey and provide them with a 360° view across the energy spectrum.





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LCP Delta provides the best advice, support and tools to enable the energy sector to drive the energy transition



Subscription research services

Our portfolio of subscription research services offer in-depth insights across the energy transition landscape. We have been undertaking primary research with organisations active in the energy transition since 2004 – we have an unparalleled international network of contacts we can draw on. Each service focuses on a particular aspect of the energy transition.

Market and strategic advisory consulting

We provide support across the full energy value chain with bespoke research, insight, forecasts and advice tailored to them. Our consultancy offerings draws on expertise and data from across LCP Delta, from strategic market entry analysis through to detailed half-hourly revenue forecasting.



We support our clients in four ways



Technology & data

Data integration and analysis is at the heart of the energy transition. However, sourcing and navigating complex, wide-ranging datasets is challenging. At LCP Delta, we combine and curate proprietary and public datasets to provide you with a single source of truth across the energy spectrum and make this data interactive using our cutting-edge technology.

Training

Our training helps professionals quickly develop their new energy knowledge, accelerating their impact for organisations who want to capture opportunities. We provide meaningful, concise and easy to understand short courses.





Subscription Research Services

Use a combination of our subscription research services, bespoke consultancy projects and training services to gather the information you need to ensure your business's success in the energy transition.





Connected Home Service Scope of Research

Researching the topics you need to know about

- What is the current state of the connected home market?
- How is the market evolving, what are the trends, and what opportunities show most promise?
- How are companies positioning themselves in the market, who is succeeding, and how?
- What are the most promising business models, propositions and services related to the connected home?
- How will interoperability within the home evolve?
- What's the current state of interoperability in the and how is this going to evolve in the future?
- What's the state of the European connected home market, and what are the key trends?
- What is the opportunity for connected homes in new build markets?
- What is the role for connected homes in social housing?
- How are protocols, standards and communications technology developing and how will this affect the connected home market?
- How will global technology trends and big tech impact the connected home market?
- How will heat pumps and hybrids interface with connected homes?
- Connected communal heating controls what's the state of play and what are the opportunities?
- How is connectivity enabling services in the home?





How our research helps your business

The Service provides data, analysis, insights and opinion on how the connected home market is developing, enabling you to understand and capture the best opportunities.

Benefits

- Enables you to identify the best market opportunities for your products and services
- Supports you in developing the best approaches to and business models for connected
- Helps you best develop products and propositions
- Understand competitors and assess opportunities for partnerships and collaboration.
- Capture the growing opportunities for home energy management.
- Anticipate market developments and manage risk

Example clients

- Energy suppliers
- HVAC manufacturer
- Tech companies
- Policymakers
- Industry associations
- *"LCP Delta writes reports in a consumer-friendly way, making complicated information simple to understand."*
 - Policy maker



Connected Home Service - What we cover in our research





Connected Home Service - What we cover in our research

Our markets

Country by country analysis





Connected Home Research Examples

Our databases



Connected Home Sales database (Excel)

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Connected Home Sales dashboard (PowerBI)



Annual State of the Market Report



LCPDelta

Annual state of the market . Connected Home Service

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⁺LCPDelta

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Key findings

The smart thermostat market will become stronger in market share and value

Non-connected thermostats are losing market share to smart thermostats. The latter will reach 50% of the total thermostats sold in 2030.

Most of the players (HVACs and Control specialists) in the market are shifting their focus into connectivity.



^{*}Countries covered: FR, DE, IT, NL, SE, TR and UK

Overall thermostat market sales*

Smart thermostats will increase its share in the market value from 40% in 2020 to over 70% in 2030.





EXTRACT from the Connected Heat Pumps report (more details available to subscribers) ⁺LCPDelta *France and the Nordics are the largest connected heat pump markets today.*





Landscape of key companies in the market*

Non-exhaustive list of some of the key players in the European thermostat market

	Smart thermostats	Connected heat pump (hydronic)	Non-connected thermostats		
HVACs	GROUPE ATLANTIC ARISTON VIESMANN THERMO GROUP VIESMANN	Panasonic MITSUBISHI ARISTON THERMOGROUP BDR THERMEA GROUP BOSCH CLG	BOSCH Waillant BDR THERMEA GROUPE ATLANTIC ARISTON THERMO GROUP THERMO GROUP THERMO GROUP		
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*Countries covered: FR, DE, IT, NL, SE, TR and UK

EXTRACT from the Remote Diagnostics report

What are the existing routes to market for remote diagnostics?

B2B is the most important route to market for scale

B2B remote diagnostics partnerships with large energy suppliers and installers resulted in largest market growth for gas boilers. We expect a similar behaviour for heat pumps in future.

B2C

HVACs

- * HVACs with a B2C offering for remote diagnostics develop their own in-house service platform to maximise control.
- They will either have:
 - Their own servicing team in the region (e.g. Baxi UK has a servicing division with ~250 engineers).
 - Contractors (e.g. Mitsubishi electric's partner program provides service and maintenance).

Control companies

- Control companies use APIs, open protocols (e.g. OpenTherm) or reverse engineering to provide remote diagnostics directly to customer as a service.
- SmartDHOME is running trials with HVACs and energy companies.

B2B

Installers / maintenance providers

- These providers usually partner with HVACs (either for free or paying a fee) to offer remote diagnostics to end customers. They can benefit by:
 - Reducing costs by eliminating unnecessary visits and being more efficient when visiting homes.
 - Customer loyalty by offering comfort to the customer by reducing repair waiting times or prevent malfunctions.

Energy suppliers

Energy suppliers provide remote diagnostics through partnerships with controls companies or HVACs. This is typically as an add on to their existing maintenance contracts to enhance their offering.

B2B

Social housing / housing associations

- There are currently numerous small trials for social housing incorporating remote diagnostics. The benefit of reduced operational costs of maintenance is key for low-income households.
 - Remote diagnostics can save on engineer call-out fees.
 - Better planning as they can also schedule visits for the winter season based on the condition of residents heating systems.
- Remote diagnostics has also been used to ensure maximum efficiency and therefore the lowest bills for tenants
 - Additionally, it can identify those who are cold on purpose to save money due to fuel poverty





EXTRACT from the Remote Diagnostics report

European landscape of companies offering remote diagnostics

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HVACs have the largest number of remote diagnostics offerings

HVACs dominate the remote diagnostics market while control companies and service providers are trying to increase their presence.

+ LCP Delta	HVACs		Control Companies	Installers/Se	rvice provider	F Energy suppliers	
Heat pump remote diagnostics	MITSUBISHI ELECTRIC LG Electronics DAIKIN VAILLANT GROUP GROUPE ATLANTIC VIESMANN SA Hisense BDR THERMEA	FUJITSU FUJITSU ITSU ITSU	resideo SmartDHOME	O thermondo	Vericon Systems	enc	SiC
Gas boiler remote diagnostics	INTERGAS BDR THERMEA GRO VAILLANT GROUP VIESMANN	GROUPE ATLANTIC OUP BOSCH ARISTON GROUP	Netatmo tado° resideo SmartDHOME	V SWALE	Feenstra ericon ystems	British Gas	eco

EXTRACT from the HVAC Protocols report (more details available to subscribers) *Connectivity by heating & technologies*



Gas boilers

Proprietary protocols are the most common across major HVACs. However, most gas boilers can be connected using on/off controls.

Key players



BDR THERMEA GROUP

VAILLANT GROUP





NTERGAS

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- Wi-Fi is the most common way to connect a gas boiler. Only few gas boilers integrate cellular networks, where it is mainly used if there is no Wi-Fi or ethernet connectivity, which happens often in social housing.
- **OpenTherm** is the most common protocol for gas boilers, however, it is mainly used in the Netherlands (XX%+ boilers installed in NL have it). Many manufacturers also add proprietary protocols to offer additional features not available with open protocols.
- Modbus is a protocol commonly used in the HVAC industry for communication between devices such as temperature sensors and thermostats. Some HVAC companies may customise Modbus to meet specific requirements or to integrate more control points that can enable monitoring or other services.
- **APIs** enable easy integration between the gas boiler and other third-party platforms without the need of using a specific API. The HVAC can define the level of control or information these platforms can access.



**Matter promoters or participants, not currently compatible.

EXTRACT from the 2024 Matter viewpoint

What energy-related companies supporting Matter today?

The growing number of energy-related companies primarily consist of control specialists and HVACs.

- While the number of CSA members has grown in 2023, there has been a persistent dominance of home automation members, who were already the majority in the previous year.
- Among the energy-related* companies, control specialists remain the most prevalent, followed by HVACs, then smart meter companies.
- Recent CSA member growth has been observed equally in HVACs and control specialist categories. The new additions in the HVAC category include companies such as **Hitachi** and **Daikin**, while companies such as **Heatmiser** and **Sensibo** are among the new members in the control specialist category.
- The growth in new members has expanded to include a few new EV charging companies, such as Hager, Zapek, and Connected Kerb. This suggests a growing interest in Matter among EV charging companies.
- However, in the category of batteries and PV inverters, there has been no notable increase in major company memberships during this period.



*In this report **energy-related** companies or products, refer specifically to connected climate control (including smart thermostats and connected TRVs) as well as HEM assets such as HVAC systems, EV charging points, PV, and batteries.

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Recent and Upcoming Research





controls: HVACs Protocols database

Control Platforms

8-8 +

Annual State of the Market + Sales **Database Update**

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*to be published in the next few months

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