

ANMD-MRS26-253 · Smart Building Technologies

# Occupancy Sensors

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

## WHY THIS REPORT

Occupancy sensors detect presence and vacancy to drive lighting, HVAC and space analytics, cutting waste and informing how buildings are used, delivering combined performance and sustainability outcomes with minimal waste. This decision-grade study sizes the global market three ways — value, volume and detection range — across the report’s segmentation axes, seven regions and four scenarios to 2032, with outlooks to 2050.

## SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report’s backbone, not an afterthought. Beyond performance, occupancy sensors deliver measurable energy savings and building-performance outcomes, while resource-efficient design and circularity strengthen the natural-capital story.

### Mapped Sustainable Development Goals:

<b>SDG 7</b> Affordable & Clean Energy	<b>SDG 11</b> Sustainable Cities	<b>SDG 12</b> Responsible Consumption
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### Measurable sustainability outcomes assessed:

- Energy savings from presence- and vacancy-based control
- Space-utilisation insight and right-sizing of real estate
- Improved comfort and demand-driven conditioning
- Sensor embodied carbon and electronics end-of-life as material risks

**Framework alignment:** Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

## WHAT'S INSIDE AT A GLANCE

<b>53</b> Chapters	<b>9</b> Report Parts	<b>7</b> Regions Covered	<b>40+</b> Country Markets
<b>2025–32</b> Forecast Horizon	<b>4</b> Forward Scenarios	<b>25+</b> Companies Profiled	<b>3</b> SDGs Mapped

## REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America adoption leader ; Europe policy leader ; Asia Pacific scale engine.

## MARKET OVERVIEW

### From simple switches to the building sensing layer — where presence data drives energy and space decisions.

Occupancy sensing is moving from simple lighting triggers to building-wide space intelligence. Demand is driven by energy codes, hybrid-work space optimisation and HVAC control, supported by maturing dual-tech and wireless sensors. The market is read three ways — value, unit volume and detection coverage — and forecast under conservative, base, accelerated and disruption scenarios, with every projection resolved to the 2025 base year and each region reported separately rather than folded into Rest of World.

- North America leads adoption, anchored by the United States and Canada, where energy codes and workplace-optimisation drive sensor demand.
- Europe scales on efficiency rules, with Germany, the United Kingdom and the Nordics embedding presence control in building codes.
- Asia Pacific is the volume engine, as China, Japan and India expand commercial and institutional construction.
- Technology and connectivity segment the value, across PIR, ultrasonic and dual-tech sensors, and wired and wireless connectivity, each with distinct economics.
- Space intelligence is the differentiator, occupancy analytics plus energy control underpin value simple switches cannot match.

## REGIONAL OUTLOOK

Across the seven reporting regions, the report separates adoption leaders from high-growth and emerging markets, profiling named country sub-markets, building-code regimes and project pipelines in each. North America and Europe anchor near-term value; Asia Pacific scales on smart new construction; while Latin America, the Middle East and Africa are assessed on their own merits — for commercial modernisation, smart-city programmes and efficiency retrofit — rather than aggregated away.

Region	Stage	Lead Markets & Drivers
North America	Adoption leader	United States, Canada — large commercial stock, retrofit demand, ESG reporting
Europe	Policy leader	Germany, United Kingdom, France, Nordics — energy codes, CSRD, healthy-building rules
Asia Pacific	Scale engine	China, Japan, India, Australia, Singapore — smart new-build, urbanisation, manufacturing
Latin America	Emerging	Brazil, Mexico — commercial modernisation, energy-cost drivers
Middle East	High-growth	UAE, Saudi Arabia — smart-city programmes, green-building mandates
Africa	Frontier	South Africa, Kenya — commercial estates, efficiency retrofit

## KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> <li>• Energy codes &amp; presence-based control</li> <li>• Hybrid-work space optimisation</li> <li>• HVAC &amp; lighting integration</li> <li>• Workplace-analytics &amp; utilisation value</li> <li>• Dual-tech &amp; wireless-sensor technology gains</li> </ul>	<ul style="list-style-type: none"> <li>• False-trigger &amp; sensitivity calibration</li> <li>• Wiring &amp; retrofit installation cost</li> <li>• Interoperability across control systems</li> <li>• Sensor &amp; electronics cost variability</li> <li>• Privacy concerns over occupancy data</li> </ul>

## SEGMENTATION SNAPSHOT

<b>By Technology</b>	PIR · ultrasonic · dual-tech
<b>By Connectivity</b>	Wired · wireless
<b>By Component</b>	Sensor elements · electronics · connectivity · software
<b>By Application</b>	Lighting control · HVAC control · space utilization
<b>By End User</b>	Commercial offices · retail · institutional · industrial
<b>By Business Model</b>	Hardware sale · SaaS · analytics service

## TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

### Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Occupancy Sensors
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

### Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

### Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
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- › Chapter 18. Rest of World Market Intelligence

### Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

## Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

## Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
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- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
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- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

## Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
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- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

## Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

## Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

## COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans established building-technology majors, specialist hardware and software vendors, and systems integrators. Profiled players include Signify, Acuity Brands, Legrand, Schneider Electric and Honeywell. Deal activity — partnerships, technology licensing and demonstration programmes — signals a market consolidating around bankable, repeatable designs.

### Representative players profiled in the full report:

Signify N.V. · Acuity Brands, Inc. · Legrand SA · Schneider Electric SE · Honeywell International Inc. · and 20+ further profiled players across the value chain.

**Investment intelligence:** venture, growth, infrastructure, development, climate and blended finance, green bonds and sustainability-linked instruments — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.

## KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global occupancy sensors market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do the category's economics change returns versus conventional approaches?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

## WHY ANMD — THE DIFFERENCE

*Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.*

- **Triangulated sizing** — every market read three ways so value, volume and adoption views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear Go / No-Go / Conditional-Go investment verdict.

## WHO SHOULD BUY THIS REPORT

Investors, sensor OEMs, integrators, building owners, facility managers, workplace teams, lenders, and corporate strategy and ESG teams — alongside strategic corporate planners and decision-makers.

### Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com) · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

### Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com). The full detailed table of contents will be sent directly to your registered company email address.