

Smart Residential Infrastructure Market Forecasts to 2034 – Global Analysis By Component (Hardware, Software, and Services), Connectivity, Building Type, Technology, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Smart Residential Infrastructure Market is accounted for \$9.6 billion in 2026 and is expected to reach \$24.6 billion by 2034 growing at a CAGR of 12.4% during the forecast period. Smart residential infrastructure refers to integrated systems of connected devices, sensors, software platforms, and network infrastructure that automate, monitor, and optimize residential building operations. These systems encompass energy management, security and surveillance, HVAC control, lighting automation, smart appliances, water management, and entertainment connectivity deployed across single-family homes, multi-family apartments, gated communities, and smart townships. The technology incorporates IoT sensor networks, artificial intelligence, cloud computing, voice control, natural language processing, and edge computing operating across Wi-Fi, Bluetooth, Zigbee, Z-Wave, Thread, Matter, and cellular protocols. Smart residential infrastructure serves homeowners, property developers, homeowner associations, and facility management companies.

Market Dynamics:

Driver:

Energy efficiency mandates

Increasing government energy efficiency regulations and consumer cost consciousness are driving substantial smart residential infrastructure adoption. Building codes in

multiple jurisdictions mandate smart thermostats, automated lighting, and energy monitoring systems. Utility demand response programs incentivize smart appliance participation. Homeowners seek to reduce electricity and water consumption through automated optimization. The integration of renewable energy sources requires smart inverters and battery management systems. Climate change awareness strengthens the sustainability value proposition.

Restraint:

Interoperability fragmentation

The proliferation of competing smart home protocols and ecosystems creates significant interoperability challenges for residential infrastructure deployment. Devices from different manufacturers often fail to communicate seamlessly despite Matter standardization efforts. Consumers face confusion when selecting compatible products across brands. Property developers hesitate to commit to specific ecosystems that may become obsolete. The cost of retrofitting existing homes with compatible infrastructure limits addressable market expansion.

Opportunity:

Multi-dwelling integration

The expansion of smart infrastructure into multi-family apartments, gated communities, and smart townships represents a transformative growth opportunity. Shared amenities, including community energy systems, centralized security, and common area automation, require integrated infrastructure platforms. Property developers differentiate new construction through comprehensive smart home packages. Homeowners' associations deploy community-wide systems for access control, visitor management, and shared facility booking. The multi-dwelling segment offers larger contract values and centralized management advantages.

Threat:

Cybersecurity vulnerabilities

The increasing connectivity of residential infrastructure creates expanding attack surfaces that threaten consumer trust and regulatory acceptance. Smart home devices have documented histories of security flaws and botnet exploitation. Privacy concerns

regarding camera footage, voice recordings, and behavioral data collection constrain adoption. High-profile security breaches generate negative media coverage that affects entire market segments. The cost of security certification and ongoing vulnerability management increases product pricing.

Covid-19 Impact:

The COVID-19 pandemic accelerated smart residential infrastructure adoption as homeowners invested in home office, entertainment, and wellness technologies during extended lockdowns. Touchless access control and automated delivery management gained importance. Remote work increased demand for reliable home network infrastructure and energy management. Post-pandemic, the emphasis on healthy indoor environments drove air quality monitoring and automated ventilation upgrades. The normalization of home-centric lifestyles sustained investment in residential technology infrastructure.

The hardware segment is expected to be the largest during the forecast period

The hardware segment is expected to account for the largest market share during the forecast period, due to the physical infrastructure requirements of smart home deployments and the high unit costs of connected devices. Smart thermostats, security cameras, lighting controllers, and appliances represent significant capital expenditure. New construction mandates increasingly require pre-installed smart infrastructure. Hardware upgrades and replacements generate recurring revenue through device refresh cycles. The integration of artificial intelligence processing into edge devices increases unit value.

The edge computing segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the edge computing segment is predicted to witness the highest growth rate, driven by the need for low-latency processing, privacy preservation, and reduced cloud dependency in residential environments. Edge devices process sensor data locally for immediate response in security and safety applications. On-device machine learning enables personalized automation without transmitting sensitive data to cloud servers. The declining cost of edge computing hardware makes local processing economically viable. Network reliability concerns strengthen the case for autonomous edge operation.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to high disposable income, mature smart home ecosystem development, and strong technology vendor presence. The United States leads with Amazon, Google, Apple, and Samsung offering comprehensive smart home platforms. New construction increasingly includes smart infrastructure as standard. Utility rebate programs incentivize smart thermostat and appliance adoption. The region's cybersecurity and privacy frameworks support consumer confidence in connected home technologies.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by rapid urban residential development, government smart city initiatives, and expanding middle-class technology adoption. China leads with domestic manufacturers offering affordable smart home ecosystems. India's affordable housing programs incorporate basic smart infrastructure. Japan and South Korea demonstrate high technology readiness for advanced residential automation. Government energy efficiency and sustainability targets mandate smart building standards.

Key players in the market

Some of the key players in Smart Residential Infrastructure Market include Honeywell International Inc., Siemens AG, Schneider Electric SE, Johnson Controls International plc, ABB Ltd., Google LLC, Amazon.com Inc., Apple Inc., Samsung Electronics Co. Ltd., LG Electronics Inc., Legrand SA, Crestron Electronics Inc., Control4 Corporation, Lutron Electronics Co. Inc., ADT Inc., Vivint Smart Home Inc. and Ecobee Inc.

Key Developments:

In May 2026, Amazon.com Inc. launched a unified smart home ecosystem integrating Ring, Echo, and Alexa capabilities with Matter protocol support, enabling seamless control of third-party devices through a single voice and app interface.

In April 2026, Google LLC introduced an AI-powered home energy optimization platform that analyzes usage patterns, weather forecasts, and utility rate structures to automatically adjust HVAC and appliance schedules for maximum savings.

In March 2026, Samsung Electronics Co. Ltd. expanded its SmartThings ecosystem to include comprehensive water management solutions featuring leak detection, automated shutoff valves, and consumption analytics integrated with existing home automation platforms.

Components Covered:

Hardware

Software

Services

Connectivities Covered:

Wi-Fi

Bluetooth and BLE

Zigbee

Z-Wave

Thread and Matter

Cellular and LPWAN

Building Types Covered:

Single-Family Homes

Multi-Family Apartments

Gated Communities

Smart Townships

Technologies Covered:

IoT and Sensor Networks

AI and Machine Learning

Cloud Computing

Voice Control and NLP

Edge Computing

Applications Covered:

Energy Management

Security and Surveillance

HVAC Control

Lighting Control

Smart Appliances

Water Management

Entertainment and Connectivity

End Users Covered:

Homeowners

Property Developers

Homeowners Associations

Facility Management Companies

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL SMART RESIDENTIAL INFRASTRUCTURE MARKET, BY COMPONENT

- 5.1 Hardware
- 5.2 Software
- 5.3 Services

6 GLOBAL SMART RESIDENTIAL INFRASTRUCTURE MARKET, BY CONNECTIVITY

- 6.1 Wi-Fi
- 6.2 Bluetooth and BLE
- 6.3 Zigbee
- 6.4 Z-Wave
- 6.5 Thread and Matter
- 6.6 Cellular and LPWAN

7 GLOBAL SMART RESIDENTIAL INFRASTRUCTURE MARKET, BY BUILDING TYPE

- 7.1 Single-Family Homes
- 7.2 Multi-Family Apartments
- 7.3 Gated Communities
- 7.4 Smart Townships

8 GLOBAL SMART RESIDENTIAL INFRASTRUCTURE MARKET, BY TECHNOLOGY

- 8.1 IoT and Sensor Networks
- 8.2 AI and Machine Learning
- 8.3 Cloud Computing
- 8.4 Voice Control and NLP
- 8.5 Edge Computing

9 GLOBAL SMART RESIDENTIAL INFRASTRUCTURE MARKET, BY APPLICATION

- 9.1 Energy Management
- 9.2 Security and Surveillance
- 9.3 HVAC Control
- 9.4 Lighting Control
- 9.5 Smart Appliances
- 9.9 Water Management
- 9.7 Entertainment and Connectivity

10 GLOBAL SMART RESIDENTIAL INFRASTRUCTURE MARKET, BY END USER

- 10.1 Homeowners
- 10.2 Property Developers
- 10.3 Homeowners Associations
- 10.4 Facility Management Companies

11 GLOBAL SMART RESIDENTIAL INFRASTRUCTURE MARKET, BY GEOGRAPHY

- 11.1 North America
 - 11.1.1 United States
 - 11.1.2 Canada
 - 11.1.3 Mexico
- 11.2 Europe
 - 11.2.1 United Kingdom
 - 11.2.2 Germany
 - 11.2.3 France
 - 11.2.4 Italy
 - 11.2.5 Spain
 - 11.2.6 Netherlands
 - 11.2.7 Belgium
 - 11.2.8 Sweden
 - 11.2.9 Switzerland
 - 11.2.10 Poland
 - 11.2.11 Rest of Europe
- 11.3 Asia Pacific
 - 11.3.1 China
 - 11.3.2 Japan
 - 11.3.3 India
 - 11.3.4 South Korea

- 11.3.5 Australia
- 11.3.6 Indonesia
- 11.3.7 Thailand
- 11.3.8 Malaysia
- 11.3.9 Singapore
- 11.3.10 Vietnam
- 11.3.11 Rest of Asia Pacific
- 11.4 South America
 - 11.4.1 Brazil
 - 11.4.2 Argentina
 - 11.4.3 Colombia
 - 11.4.4 Chile
 - 11.4.5 Peru
 - 11.4.6 Rest of South America
- 11.5 Rest of the World (RoW)
 - 11.5.1 Middle East
 - 11.5.1.1 Saudi Arabia
 - 11.5.1.2 United Arab Emirates
 - 11.5.1.3 Qatar
 - 11.5.1.4 Israel
 - 11.5.1.5 Rest of Middle East
 - 11.5.2 Africa
 - 11.5.2.1 South Africa
 - 11.5.2.2 Egypt
 - 11.5.2.3 Morocco
 - 11.5.2.4 Rest of Africa

12 STRATEGIC MARKET INTELLIGENCE

- 12.1 Industry Value Network and Supply Chain Assessment
- 12.2 White-Space and Opportunity Mapping
- 12.3 Product Evolution and Market Life Cycle Analysis
- 12.4 Channel, Distributor, and Go-to-Market Assessment

13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

- 13.1 Mergers and Acquisitions
- 13.2 Partnerships, Alliances, and Joint Ventures
- 13.3 New Product Launches and Certifications

13.4 Capacity Expansion and Investments

13.5 Other Strategic Initiatives

14 COMPANY PROFILES

14.1 Honeywell International Inc.

14.2 Siemens AG

14.3 Schneider Electric SE

14.4 Johnson Controls International plc

14.5 ABB Ltd.

14.6 Google LLC

14.7 Amazon.com Inc.

14.8 Apple Inc.

14.9 Samsung Electronics Co. Ltd.

14.10 LG Electronics Inc.

14.11 Legrand SA

14.12 Crestron Electronics Inc.

14.13 Control4 Corporation

14.14 Lutron Electronics Co. Inc.

14.15 ADT Inc.

14.16 Vivint Smart Home Inc.

14.17 Ecobee Inc.

List Of Tables

LIST OF TABLES

Table 1 Global Smart Residential Infrastructure Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Smart Residential Infrastructure Market Outlook, By Component (2023-2034) (\$MN)

Table 3 Global Smart Residential Infrastructure Market Outlook, By Hardware (2023-2034) (\$MN)

Table 4 Global Smart Residential Infrastructure Market Outlook, By Software (2023-2034) (\$MN)

Table 5 Global Smart Residential Infrastructure Market Outlook, By Services (2023-2034) (\$MN)

Table 6 Global Smart Residential Infrastructure Market Outlook, By Connectivity (2023-2034) (\$MN)

Table 7 Global Smart Residential Infrastructure Market Outlook, By Wi-Fi (2023-2034) (\$MN)

Table 8 Global Smart Residential Infrastructure Market Outlook, By Bluetooth and BLE (2023-2034) (\$MN)

Table 9 Global Smart Residential Infrastructure Market Outlook, By Zigbee (2023-2034) (\$MN)

Table 10 Global Smart Residential Infrastructure Market Outlook, By Z-Wave (2023-2034) (\$MN)

Table 11 Global Smart Residential Infrastructure Market Outlook, By Thread and Matter (2023-2034) (\$MN)

Table 12 Global Smart Residential Infrastructure Market Outlook, By Cellular and LPWAN (2023-2034) (\$MN)

Table 13 Global Smart Residential Infrastructure Market Outlook, By Building Type (2023-2034) (\$MN)

Table 14 Global Smart Residential Infrastructure Market Outlook, By Single-Family Homes (2023-2034) (\$MN)

Table 15 Global Smart Residential Infrastructure Market Outlook, By Multi-Family Apartments (2023-2034) (\$MN)

Table 16 Global Smart Residential Infrastructure Market Outlook, By Gated Communities (2023-2034) (\$MN)

Table 17 Global Smart Residential Infrastructure Market Outlook, By Smart Townships (2023-2034) (\$MN)

Table 18 Global Smart Residential Infrastructure Market Outlook, By Technology

(2023-2034) (\$MN)

Table 19 Global Smart Residential Infrastructure Market Outlook, By IoT and Sensor Networks (2023-2034) (\$MN)

Table 20 Global Smart Residential Infrastructure Market Outlook, By AI and Machine Learning (2023-2034) (\$MN)

Table 21 Global Smart Residential Infrastructure Market Outlook, By Cloud Computing (2023-2034) (\$MN)

Table 22 Global Smart Residential Infrastructure Market Outlook, By Voice Control and NLP (2023-2034) (\$MN)

Table 23 Global Smart Residential Infrastructure Market Outlook, By Edge Computing (2023-2034) (\$MN)

Table 24 Global Smart Residential Infrastructure Market Outlook, By Application (2023-2034) (\$MN)

Table 25 Global Smart Residential Infrastructure Market Outlook, By Energy Management (2023-2034) (\$MN)

Table 26 Global Smart Residential Infrastructure Market Outlook, By Security and Surveillance (2023-2034) (\$MN)

Table 27 Global Smart Residential Infrastructure Market Outlook, By HVAC Control (2023-2034) (\$MN)

Table 28 Global Smart Residential Infrastructure Market Outlook, By Lighting Control (2023-2034) (\$MN)

Table 29 Global Smart Residential Infrastructure Market Outlook, By Smart Appliances (2023-2034) (\$MN)

Table 30 Global Smart Residential Infrastructure Market Outlook, By Water Management (2023-2034) (\$MN)

Table 31 Global Smart Residential Infrastructure Market Outlook, By Entertainment and Connectivity (2023-2034) (\$MN)

Table 32 Global Smart Residential Infrastructure Market Outlook, By End User (2023-2034) (\$MN)

Table 33 Global Smart Residential Infrastructure Market Outlook, By Homeowners (2023-2034) (\$MN)

Table 34 Global Smart Residential Infrastructure Market Outlook, By Property Developers (2023-2034) (\$MN)

Table 35 Global Smart Residential Infrastructure Market Outlook, By Homeowners Associations (2023-2034) (\$MN)

Table 36 Global Smart Residential Infrastructure Market Outlook, By Facility Management Companies (2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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