Yano Research Institute

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RESEARCH SUMMARY

Yano Research Institute Ltd.
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Big Data Analytics Market in Japan: Key Research Findings 2013

◆ Research Outline

Yano Research Institute has conducted a study on the domestic big data analytics market with the following conditions:

1. Research period: From September to November, 2012
2. Research targets: Domestic IT vendors and users
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, and literature research

What is the Big Data Analytics Market?

The big data analytics market in this research indicates the sales of software or SaaS (or both), and services (analytics and consulting) in the following areas among entire big data market: BI (Business Intelligence), statistics analytics, numerical analytics, text mining, social listening, recommender engines, access analytics, image analytics, and sensor data analytics. The market size is calculated based on the turnover of the market players.

◆ Key Findings

■ Size of Big Data Analytics Market that Attained 109.7 Billion Yen in 2012, Expected to Reach 342.2 Billion Yen by 2020

The big data analytics market in 2012 attained 109.7 billion yen based on the sales of the businesses. CAGR of the market is anticipated to be 15.3% from 2012 to 2020, by which the market size is expected achieve 342.2 billion yen.

The market is likely to be driven by increasing demands from the companies utilizing data for managing and operating business, by shipment of new statistics analytics software, and by new emerging industry that stems from mass production of sensor data.

■ Rapid Growth of Sensor Data Accelerates Expansion of Big Data Analytics Market

Outlook of big data analytics market can be viewed from short-term, mid-term and long-term aspects: In the short-term market outlook (2012 to 2014), the existing tools, including BI tools, are likely to spread out and are test used to integrate non-structured data, leading to expansion of the analytics service market.

The mid-term market view (2015 to 2017) anticipates emerge of simple analytics software, which can broaden the users of big data analytics.

In the long-term view (2008 to 2020) , the big data is likely to be considered as indispensable in business operation, with stronger importance placed for infrastructure of data distribution. This tendency is likely to generate a new industry such as a data marketplace. Also, expectation of

full adoption of wireless sensor network by many companies brings about continuous growth of big data analytics market.

◆ Report format:

Published report: “Big Data Market 2013”
Issued on: December 16, 2013
Language: Japanese
Format: 209 pages in A4 format
Price: 157,500 yen (7,500 yen of consumption tax shall be charged for the sales in Japan.)

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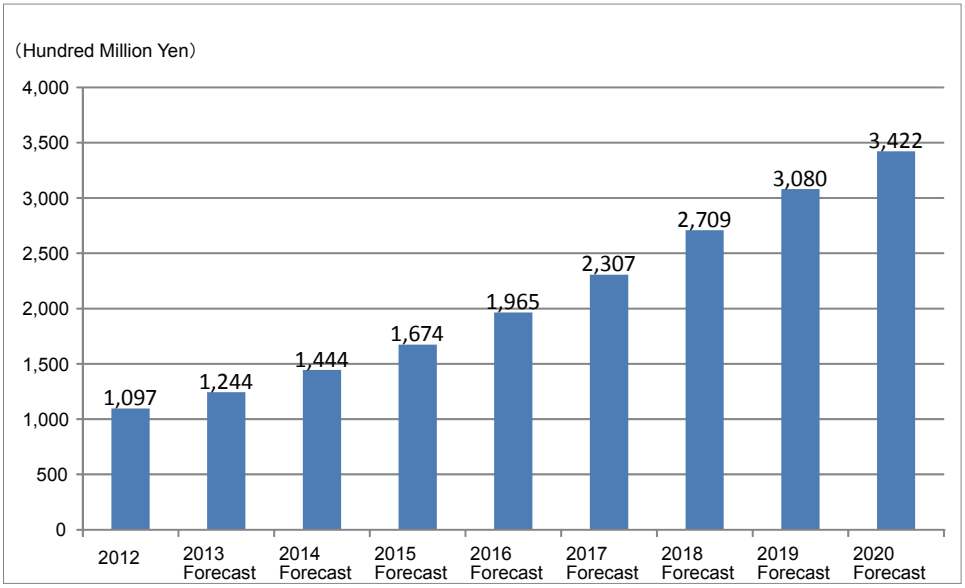
■ Figure & Table 1: Forecast of Transition and Size of Big Data Analytics Market



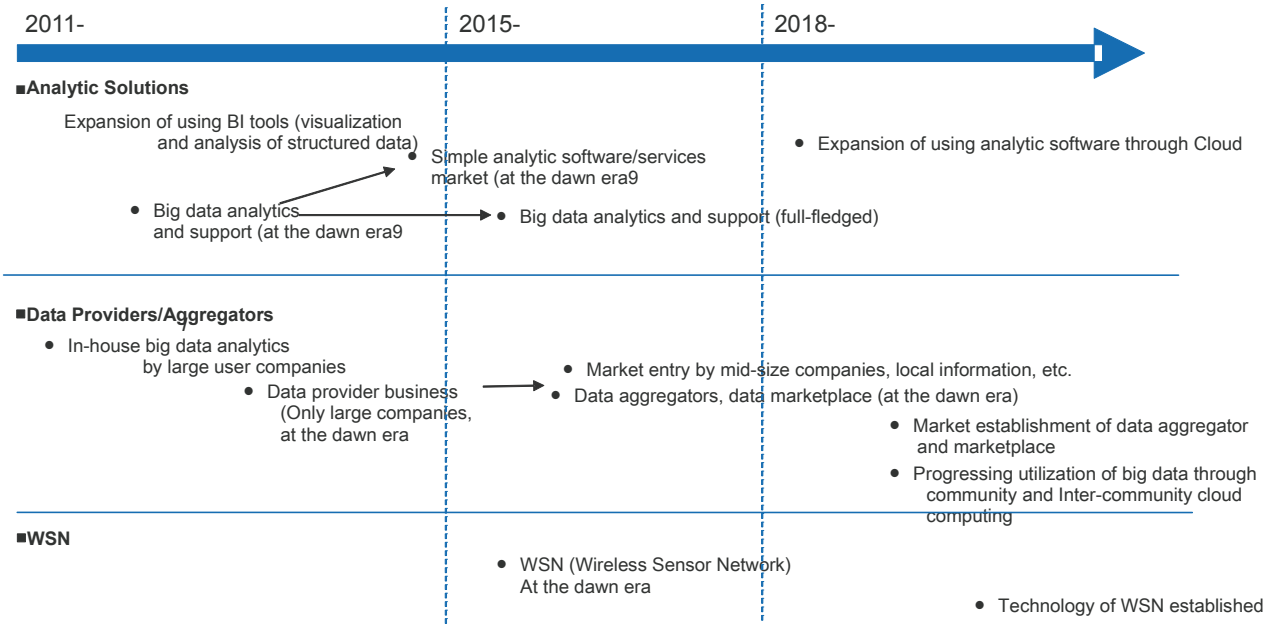
(Hundred Million Yen)

	2012	2013 (F)	2014 (F)	2015 (F)	2016 (f)	2017 (F)	2018 (F)	2019 (F)	2020 (F)
Big Data Analytics Market Size	1,097	1,244	1,444	1,674	1,965	2,307	2,709	3,080	3,422
Y-o-Y (%)		113.4%	116.1%	115.9%	117.4%	117.4%	117.4%	113.7%	111.1%
CAGR		13.4%	14.7%	15.1%	15.7%	16.0%	16.3%	15.9%	15.3%

Notes:

1. Figures are based on sales of the businesses.
2. (F) indicates forecast figures.
3. The big data analytics market in this research indicates the sales of software or SaaS (or both), and services (analytics and consulting) in the following areas among entire big data market: BI (Business Intelligence), statistics analytics, numerical analytics, text mining, social listening, recommender engines, access analytics, image analytics, and sensor data analytics.

■ **Figure 2: Trends and Future Outlook of Big Data Analytics Market**



Notes:

4. Data aggregator is a company that does not possess data sells and processes data by intermediating with data holders.
5. Reference: "Community and Inter-community Cloud Computing 2011" issued in November 2011 by Yano Research Institute.