

## **Integrated Condominium Electricity-Receiving Service Market in Japan: Key Research Findings 2015**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the market of integrated electric-power-receiving services for condominiums with the following conditions:**

1. Research period: From April to June, 2015
2. Research target: Providers of integrated electricity receiving services, energy companies, and condominium developers
3. Research methodologies: Face-to-face research by the expert researchers, surveys via email/telephone, and literature research

#### **What is an Integrated Condominium Electricity-Receiving Service?**

Conventionally, the residents of condominiums and apartments receive electric power through contracts with an electric power supply company directly. Such contracts apply to a “low voltage agreement,” the rate of which is higher than that of “high voltage agreement”. An integrated electricity-receiving service indicates an electricity supply service that provides electric power to an entire condominium or an apartment in a bulk via a service provider who receive the electricity from a power supply company. This form of power supply applies to a “high voltage agreement” which reduces the electricity bill at each resident by 5 to 10% compare to a low voltage agreement.

### ◆ **Key Findings**

#### ■ **Integrated Condominium Electricity-Receiving Service Market in FY2014 Expected to Attain 49.0 Billion Yen**

The market of integrated electric-power-receiving services for condominiums has gradually been expanding, with a series of companies entering the market and increasing number of condominiums and apartments, both newly-built and existing, introducing the service. The service has been widely accepted as a countermeasure of rising electricity rate after the Great East Japan Earthquake that struck in 2011. This trend has been driven by MEMS (Mansion Energy Management System), a subsidized business during the period of FY2013 to FY2014, which led the integrated electricity-receiving service to be a standard service at many of newly-built condominiums. The domestic integrated condominium electricity-receiving service market has grown rapidly to 49 billion yen by FY2014 based on the sales of the businesses.

#### ■ **Integrated Condominium Electricity-Receiving Service Market Expands to 200 Billion Yen by FY2030**

Full liberalization of the retail sale of electric power scheduled in 2016, including low voltage electricity, is likely to affect the market of integrated condominium electricity-receiving services. However, as a result of enhanced demand development by the integrated electricity service providers targeting newly-built condominiums, the domestic market size is projected to

attain 200 billion yen by FY2030 (based on the business sales), with the service introduced to 2.2 million residents.

◆ **Report format:**

Published report: “Apartment/Condominium Energy Service Business (Integrated Electricity-Receiving Service Market) 2015”

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Language: Japanese

Format: 189 pages in A4 format

Price: 120,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

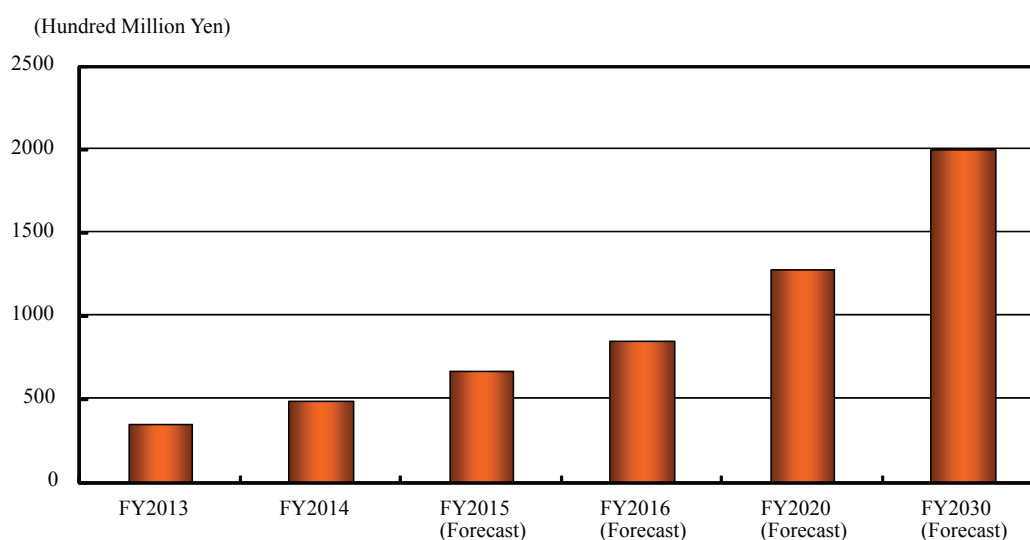
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■ **Figure and Table 1: Transition and Forecast of Integrated Condominium Electricity Receiving Service Market Size**



(Hundred Million Yen)

Fiscal Year	FY2013	FY2014	FY2015 (Forecast)	FY2016 (Forecast)	FY2020 (Forecast)	FY2030 (Forecast)
Condominium integrated electricity-receiving service market	356	490	675	855	1,280	2,000

Notes:

1. The market size is calculated based on sales of the businesses