

## **Building Maintenance Market in Japan: Key Research Findings 2017**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the building maintenance market with the following conditions:**

1. Research period: From July to September 2017
2. Research target: Building maintenance companies
3. Research methodologies: Face-to-face research by the expert researchers, questionnaire survey via telephone, and literature research

#### **What is the Building Maintenance Market?**

The building maintenance market in this research indicates a market of building maintenance services such as cleaning, equipment management, and security assurance within the buildings provided and undertaken by building maintenance companies. The market size is calculated based on the amount at contractors. Note that the market also includes peripheral jobs like repairing and renovation works conducted by such companies, but their turnover that fall into other industries is not included.

### ◆ **Key Findings**

#### ■ **Building Maintenance Market in FY2016 Attained 3,743.3 Billion Yen, 97.6% on Y-o-Y Basis**

The building maintenance market in FY2016 is projected to attain 3,743.3 billion yen, 97.6% of the size of the previous fiscal year (based on the amount at contractors). The market size is likely to slightly decline, because of the challenge in terms of profitability, though there are favorable demands from increasing accommodation facilities as well as renovations and repairing works of buildings.

#### ■ **Attempts toward Expanding Business Areas in Progress**

According to the corporate questionnaire in relation to this research that were conducted to 171 domestic leading building maintenance companies, about half of the companies regard their business areas to expand for the future in the long term view. With their basic vision of their business to expand, various attempts have been made by the building maintenance enterprises, primarily some large companies, such as to begin providing services derived from building maintenance, or to cooperate with different industries, and other new forms of business.

#### ■ **Market Size in FY2017 Projected to Achieve 3,880.4 Billion Yen, 103.7% on Y-o-Y Basis**

The building maintenance market in FY2017 is expected to attain 3,880.4 billion yen, 103.7% of the size of the preceding fiscal year, based on the amount at contractors. There still seem to be some challenges to overcome, including some attempts to solve manpower shortage and price negotiations. When considering the balance of increasing demands and profitability, the market as a whole is likely to keep the slightly increasing trend.

In addition, by and large, there are some cases where enterprises have to endure low profitability. Therefore, the market players face some challenges of acquiring some business

items that place importance on profitability, while they differentiate themselves in their service quality and provide high added values.

◆ **Report Format:**

Published report: “Building Management Market 2017”

Issued on: September 27, 2017

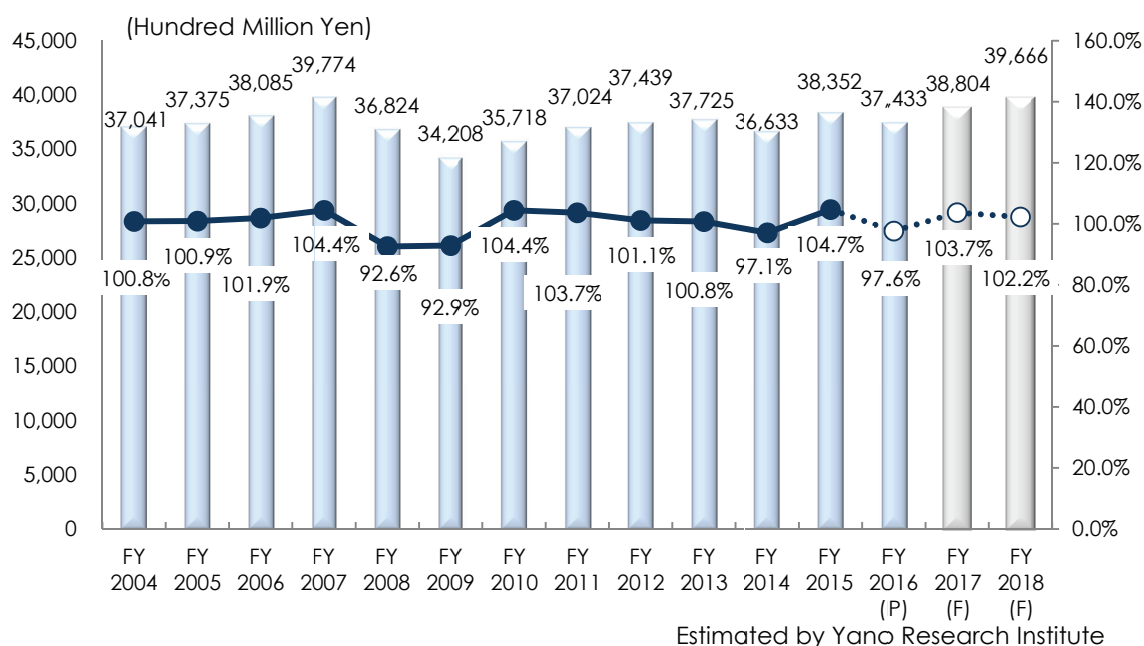
Language: Japanese

Format: 430 pages in A4 format

Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

**Contacts:** Public Relations  
**Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)**  
 Phone: +81-3-5371-6912 E-mail: [press@yano.co.jp](mailto:press@yano.co.jp)

■ **Figure 1: Transition and Forecast of Building Maintenance Market Size**



Notes:

1. The market size is based on the amount at contractors.
2. (P) stands for prospect, and (F) stands for forecast.
3. The market also includes peripheral jobs like repairing and renovation works conducted by those building maintenance companies, but their turnover that fall into other industries is not included.