

BAS (Building Automation System) Market in Japan: Key Research Findings 2011

◆ **Research Outline**

Yano Research Institute has conducted a study on BAS (Building Automation System) market with the following conditions:

1. Research period: From May to July, 2011
2. Research targets: Building instrumentation companies, electric/electronics manufacturers, general construction and engineering companies, architect offices, BAS user companies
3. Research methodologies: Face-to-face interviews, survey via email/telephone in combination with literature research

What is BAS (Building Automation System)?

BAS is a system installed in a large scale building where a central air conditioning system is adopted. BAS controls building facilities/equipments for air-conditioning, electric power, lighting, power and security.

◆ **Key Findings**

■ **BAS market in FY 2010 marked sales of 2,150 systems, up 3.9 % compared with previous year**

BAS (Building Automation System) market sold 2,150 systems in FY 2010, an increase of 3.9 % year-on-year. The figure accounts for 43.5 billion yen, up 1.3 % from the previous year. The increase in FY 2010 was due to recovery of demand for building construction, and also to BEMS (Building & Energy-Management System) that was added to BAS, fulfilling energy-saving needs.

■ **Market has changed due to demand for larger scale in building construction at redevelopment area and open systems**

Although current construction market tends to suppress construction fee, demand for buildings to be more complex, larger-scaled and more energy-saving, is keeping the BAS system price from being too low. On the other hand, however, systems at BAS have become open, enabling the system architecture to be shared with multiple vendors. This has created a new market share among the makers and driving down the prices.

■ **The market is predicted to scale down temporarily in 2011 but sales should recover by FY 2015**

BAS market is predicted to shrink temporarily from the influence of the Great East Japan Earth Quake, but is expected to recover by FY2015 to around 2,300 systems. However, the amount is predicted to remain the same level at around 43 billion yen in FY 2015.

◆ **Report format:**

Published report: “Building Energy Management Systems & Building Automation Systems Market 2011”

Issued on: July 29, 2011

Language: Japanese

Format: 253 pages in A4 format

Price: 126,000yen (6,000 yen of consumption tax shall be charged for the sales in Japan.)

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Transition of BAS market size and future forecast

FY	2007	2008	2009	2010	2011 (Forecast)	2012 (Forecast)	2013 (Forecast)	2014 (Forecast)	2015 (Forecast)
Number of systems	2,090	2,080	2,070	2,150	2,050	2,200	2,200	2,250	2,300
Comparison from last quarter(%)	113.0	99.5	99.5	103.9	95.3	107.3	100.0	102.3	102.2
Sum of money (million yen)	43,500	43,000	42,500	43,050	40,500	42,500	42,300	42,800	43,000
Comparison from last quarter(%)	111.5	98.9	98.8	101.3	94.1	104.9	99.5	101.2	100.5

