

Building Automation System Market by Offering (Facility Management Systems, Security & Access Controls, Fire Protection Systems), Communication Technology (Wireless Technologies, Wired Technologies), Application & Region-Global Forecast to 2028

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Report description:

The building automation system market is expected to reach USD 155.9 billion by 2028 from 88.4 billion in 2023, at a CAGR of 12.0% during the 2023- 2028 period.

The IoT's evolution enables seamless communication between electronic devices without human intervention, revolutionizing building automation systems. Traditionally, HVAC, security, and lighting systems operated independently, but IoT integration empowers providers to introduce smart devices for efficient building management.

Cloud technology allows building automation providers to offer autonomous, data-rich monitoring services. This cloud-based system offers a user-friendly interface and data analytics, providing insights into weather forecasts, lighting control, access permissions, utility usage, and heating/cooling patterns. IoT facilitates automatic temperature adjustments based on sensor data, reducing energy consumption and costs.

This integration also makes building automation systems more cost-effective for buildings of all sizes.

Data analytics, driven by the vast data streams from various sources like sensors and thermostats, has the potential to transform the building automation market. It enhances facility management, reduces costs, and improves performance. The challenge lies in delivering intelligent solutions to predict equipment failures and understand user behavior through historical data analysis.

Leading companies like IBM and Schneider are pioneering advanced data analytics platforms, but there is immense potential for expanding these capabilities, ultimately tailoring solutions to each building's unique data profile.

"Security & Access Control is expected to have the highest market share in the forecast period."

The safety and security systems of buildings and their occupants now include security and access control systems as standard

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components. They have done away with human intervention and transformed building security. These devices are put in place in buildings to track who enters and leaves, monitor people's movements and activities, and raise security levels. These systems are used by many organizations to monitor activity within buildings, regulate entry to premises, and safeguard their property, personnel, and data. To protect their citizens from terrorist assaults, governments throughout the world are investing more and more in creating dependable and strong security systems. The need for home security solutions is increasing quickly due to a number of factors, including the need to monitor children and provide medical care for elderly people at home, an increase in crime, and technological developments in home security solutions. Biometric and video surveillance systems are two categories under which security and access control systems fall. In the building automation system industry, Honeywell Security Group (US), Siemens AG (Germany), Carrier (US), and Trane Technologies (Ireland) are prominent players that offer security and access control systems.

"North America recorded the highest market share in the building automation system market for 2022."

North America stands as one of the world's most developed regions and a prominent hub for the building automation systems market. In the year 2022, North America held a highest market share within the building automation system industry. The escalating demand for energy management and the increasing desire for eco-friendly residences have fueled the expansion of the North American building automation system market. This market has been scrutinized with a focus on the US, Canada, and Mexico.

Government agencies across the region collaborate to foster efficient and clean energy production and utilization. A noteworthy example is the North American Energy Working Group (NAEWG), established in 2001 through the joint efforts of the US, Canada, and Mexico. NAEWG's primary objective is to bolster energy cooperation within the region. This includes enhancing communication and collaboration among these nations' governments and energy sectors regarding shared energy-related concerns. Additionally, the group concentrates on advancing energy trade and ensuring consistent interconnections in North America to promote sustainable development.

"Building automation system by commercial application is projected to have the highest market share in the forecast period" Commercial applications of building automation systems encompass office complexes, hotels, healthcare institutions, retail and public gathering spaces, airports and train stations, warehouses, and more. Office buildings stand out as significant users of commercial building automation systems due to the prevalent utilization of energy-intensive equipment like HVAC and lighting control systems. These systems in office buildings primarily encompass HVAC control, lighting control, and security and access control. Many businesses prioritize creating a comfortable work environment with well-managed HVAC and efficient lighting systems to enhance employee productivity. For instance, May 2023 marked the completion of a 16-story office tower- the 555 Greenwich development- in New York City, touted as one of the most sustainable office buildings in the city, developed by the Hudson Square Properties and Hines. The office building features an innovative HVAC system with geothermal wells, a dedicated outdoor air system (DOAS), radiant heating and cooling, and a sophisticated control system for optimal performance. Connected to an adjoining office building, it is expected to use less than half the energy of its neighbor and be 40% more energy-efficient than the average large office building in New York. The tower is fully electrified, uses advanced HVAC technologies, and employs AI for energy-efficient operations, setting a precedent for sustainability in the city. Consulting engineers and sustainable design firms collaborated on this advanced HVAC system.

Retail buildings encompass various retail outlets, grocery stores, and expansive shopping malls. Public buildings include government-owned public administration facilities, municipal offices, utilities for water and electricity distribution, sports complexes, and auditoriums. Retail operations present a complex landscape with challenges such as security concerns, including theft and inventory losses that impact profits. Therefore, security and access control systems are of paramount importance in the retail sector. Furthermore, the adoption of HVAC control and security systems has become a standard practice in shopping malls and grocery stores, ensuring the safety and comfort of shoppers while also contributing to energy cost reductions. Some companies deliver building automation system solutions for retail and public assembly buildings. For instance, 75F, an Indian company based in Bengaluru, offers building automation systems for retail applications that include energy management solutions to increase energy efficiency, creating effective scheduling for building lighting etc. The company- 75F received an investment from Next47, the global venture capital firm backed by Siemens, led the investment on behalf of Siemens Smart

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Infrastructure, because of its innovative solutions.

The majority of retailers contend with the issue of exceptionally narrow profit margins, rendering them acutely conscious of their operational expenditures. From individual stores to global retail chains, concerns revolve around building leases, escalating merchandise costs, and various fixed expenses. As a result, there has been a growing inclination towards implementing building automation systems, primarily to mitigate energy expenses. Leveraging wireless communication and cloud technology has made building controls more cost-effective. The adoption of building automation systems incorporating wireless communication and cloud capabilities has empowered numerous retail enterprises to achieve substantial energy cost reductions, often reaching up to 30%.

"Facility management type lighting control to grow at the highest CAGR for building automation system in the forecast period"

Lighting controls are important in building automation. Despite using less energy than HVAC systems, lighting systems are deployed in huge numbers in buildings, necessitating their automation. Lighting controls fulfill the current demands for environmental sustainability and responsibility while assisting in the promotion of energy efficiency and cost savings in a simple and accessible way. Lighting controls allow lighting systems to adapt to the real-world conditions in a room, such as the quantity of natural light present and the number of people using the space. As a result, lighting controls give residents the appropriate quantity of artificial light based on their needs. These systems are widely used in commercial, residential, and industrial buildings for both interior and outdoor illumination. The demand for lighting controls is rising worldwide since they are crucial for energy conservation.

Lighting sensors can be used to detect occupancy, daylight, and motion. This data can then be used to automate the operation of lighting systems, such as turning lights on and off automatically, adjusting the brightness of lights, and dimming lights when there is sufficient natural light. These sensors can help to improve energy efficiency by reducing the amount of time that lights are on unnecessarily. For example, occupancy sensors can turn off lights in empty rooms, and daylight harvesting systems can reduce the need for artificial light during the day. They can help to reduce operating costs by lowering energy bills. Additionally, they can reduce the need for maintenance and replacement of lighting fixtures. They can help to improve comfort and productivity by creating a more dynamic and responsive lighting environment. They can also be used to enhance security by detecting movement in areas where people should not be.

The break-up of the profile of primary participants in the building automation system market-

□By Company Type: Tier 1 ? 30%, Tier 2 ? 50%, Tier 3 ? 20%

□By Designation Type: C Level ? 25%, Director Level ? 35%, Others ? 40%

□By Region Type: North America ? 35%, Europe ?30 %, Asia Pacific ? 25%, RoW ? 10%,

The major players in the building automation system market are Honeywell International Inc. (US), Siemens (Germany), Johnson Controls (US), Schneider Electric (France), Carrier (US), Robert Bosch GmbH (Germany), Legrand (France), Hubbell (US), ABB (Switzerland), Trane Technologies plc (Ireland), Lutron Electronics Co., Inc (US), Crestron Electronics, Inc. (US), Hitachi, Ltd. (Japan), Delta Controls (Canada), Beckhoff Automation (Germany), Lennox International Inc. (US), Current Lighting Solutions, LLC. (US), AUCITY BRANDS, INC, (Canada), Dialight (UK), Cisco Systems, Inc. (US), Rockwell Automation (US), Snap One, LLC (US), Signify Holding (Netherlands), Emerson Electric Co. (US), Leviton Manufacturing Co., Inc. (US), Mitsubishi Electric Corporation (Japan), Huawei Technologies Co., Ltd. (China), Bajaj Electricals Ltd (India), and Beijer Electronics, Inc. (Sweden).

Research Coverage

The report segments the building automation system market and forecasts its size based and region. The report also provides a comprehensive review of drivers, restraints, opportunities, and challenges influencing market growth. The report also covers qualitative aspects in addition to the quantitative aspects of the market.

Reasons to buy the report:

The report will help the market leaders/new entrants in this market with information on the closest approximate revenues for the overall building automation system market and related segments. This report will help stakeholders understand the competitive

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landscape and gain more insights to strengthen their position in the market and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

■ Analysis of key drivers (empowering building automation through remote monitoring and control), restraints (complexity of customizing building automation solution), opportunities (increasing government and stakeholders' investments for the establishment of smart cities), and challenges (rapid technological evolution poses an obstacle to the building automation system growth)

■ Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the building automation system market

■ Market Development: Comprehensive information about lucrative markets ? the report analyses the building automation system market across varied regions.

■ Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the building automation system market

■ Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like Honeywell International Inc. (US), Siemens (Germany), Johnson Controls (US), Schneider Electric (France), Carrier (US), and many more.

Table of Contents:

1 INTRODUCTION 24

1.1 STUDY OBJECTIVES 24

1.2 MARKET DEFINITION 24

1.2.1 INCLUSIONS AND EXCLUSIONS 25

1.3 STUDY SCOPE 26

1.3.1 MARKETS COVERED 26

FIGURE 1 BUILDING AUTOMATION SYSTEM MARKET: SEGMENTATION 26

1.3.2 REGIONAL SCOPE 26

1.3.3 YEARS CONSIDERED 27

1.3.4 CURRENCY CONSIDERED 27

1.4 LIMITATIONS 27

1.5 STAKEHOLDERS 28

1.6 SUMMARY OF CHANGES 28

1.7 RECESSION IMPACT 28

2 RESEARCH METHODOLOGY 29

2.1 RESEARCH DATA 29

FIGURE 2 BUILDING AUTOMATION SYSTEM MARKET: RESEARCH DESIGN 30

2.1.1 SECONDARY DATA 30

2.1.1.1 Key data from secondary sources 31

2.1.1.2 Key secondary sources 32

2.1.2 PRIMARY DATA 32

2.1.2.1 Key data from primary sources 33

2.1.2.2 Key participants for primaries 33

2.1.2.3 Breakdown of primaries 34

2.1.2.4 Key industry insights 34

2.1.3 SECONDARY AND PRIMARY RESEARCH 35

2.2 MARKET SIZE ESTIMATION 35

FIGURE 3 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 1 (SUPPLY SIDE): REVENUE GENERATED BY KEY PLAYERS IN

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BUILDING AUTOMATION SYSTEM MARKET 36

FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 2 (SUPPLY SIDE): ILLUSTRATION OF REVENUE ESTIMATION OF KEY PLAYERS IN BUILDING AUTOMATION SYSTEM MARKET 37

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 3 (DEMAND SIDE) - BOTTOM-UP ESTIMATION OF BUILDING AUTOMATION SYSTEM MARKET BASED ON REGION 38

2.2.1 BOTTOM-UP APPROACH 38

2.2.1.1 Approach to derive market size using bottom-up analysis 38

FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH 39

2.2.2 TOP-DOWN APPROACH 39

2.2.2.1 Approach to derive market size using top-down analysis 39

FIGURE 7 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH 39

2.3 MARKET SHARE ESTIMATION 40

2.4 DATA TRIANGULATION 40

FIGURE 8 DATA TRIANGULATION 41

2.5 RISK ASSESSMENT 41

TABLE 1 RISK ASSESSMENT 42

2.6 PARAMETERS CONSIDERED TO ANALYZE RECESSION IMPACT ON BUILDING AUTOMATION SYSTEM MARKET 42

2.7 RESEARCH ASSUMPTIONS 43

2.8 RESEARCH LIMITATIONS 43

3 EXECUTIVE SUMMARY 44

3.1 IMPACT OF RECESSION 44

FIGURE 9 BUILDING AUTOMATION SYSTEM MARKET: IMPACT OF RECESSION 45

FIGURE 10 SECURITY & ACCESS CONTROLS SEGMENT TO HOLD LARGEST MARKET SHARE IN 2028 45

FIGURE 11 COMMERCIAL SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE IN 2028 46

FIGURE 12 WIRELESS TECHNOLOGIES SEGMENT TO REGISTER HIGHER CAGR DURING FORECAST PERIOD 46

FIGURE 13 ASIA PACIFIC TO REGISTER HIGHEST CAGR IN BUILDING AUTOMATION SYSTEM MARKET DURING FORECAST PERIOD 47

4 PREMIUM INSIGHTS 48

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN BUILDING AUTOMATION SYSTEM MARKET 48

FIGURE 14 RISING FOCUS ON CONSTRUCTING ENERGY-EFFICIENT AND ECO-FRIENDLY BUILDINGS 48

4.2 BUILDING AUTOMATION SYSTEM MARKET, BY FACILITY MANAGEMENT SYSTEMS 48

FIGURE 15 HVAC CONTROLS SEGMENT TO HOLD LARGER MARKET SHARE IN 2023 48

4.3 BUILDING AUTOMATION SYSTEM MARKET, BY SECURITY AND ACCESS CONTROL TYPE 49

FIGURE 16 BIOMETRIC SYSTEMS SEGMENT TO REGISTER HIGHER CAGR DURING FORECAST PERIOD 49

4.4 BUILDING AUTOMATION SYSTEM MARKET, BY COUNTRY 49

FIGURE 17 INDIA TO EXHIBIT HIGHEST CAGR IN BUILDING AUTOMATION SYSTEM MARKET DURING FORECAST PERIOD 49

5 MARKET OVERVIEW 50

5.1 INTRODUCTION 50

5.2 MARKET DYNAMICS 51

FIGURE 18 BUILDING AUTOMATION SYSTEM MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES 51

?

5.2.1 DRIVERS 52

5.2.1.1 High emphasis on constructing energy-efficient buildings 52

5.2.1.2 Incorporation of advanced surveillance and biometric technologies into building automation systems 52

5.2.1.3 Integration of IoT technologies and data analytics into building automation systems 53

5.2.1.4 Development of wireless protocols and wireless sensor network technology for building automation systems 53

5.2.1.5 Growing need to enhance occupant comfort, productivity, security, and safety in residential, commercial, and industrial sectors 54

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FIGURE 19□BUILDING AUTOMATION SYSTEM MARKET: IMPACT ANALYSIS OF DRIVERS□54

5.2.2□RESTRAINTS□55

5.2.2.1□Technical complexities associated with installation and maintenance and shortage of skilled professionals□55

5.2.2.2□Difficulties in customizing building automation systems□55

FIGURE 20□BUILDING AUTOMATION SYSTEM MARKET: IMPACT ANALYSIS OF RESTRAINTS□56

5.2.3□OPPORTUNITIES□56

5.2.3.1□Increasing investments by governments and various stakeholders in establishment of smart cities□56

5.2.3.2□Government-led initiatives to enhance energy efficiency and comply with green building standards□56

5.2.3.3□Integration of building automation systems with renewable energy sources□57

FIGURE 21□BUILDING AUTOMATION SYSTEM MARKET: IMPACT ANALYSIS OF OPPORTUNITIES□57

5.2.4□CHALLENGES□58

5.2.4.1□Lack of standardized communication protocols□58

5.2.4.2□Need to keep systems up-to-date with rapid technological advancements□58

FIGURE 22□BUILDING AUTOMATION MARKET: IMPACT ANALYSIS OF CHALLENGES□59

5.3□SUPPLY CHAIN ANALYSIS□59

FIGURE 23□BUILDING AUTOMATION SYSTEM MARKET: SUPPLY CHAIN ANALYSIS□59

5.3.1□RESEARCH AND DEVELOPMENT (R&D)□60

5.3.2□PRODUCT MANUFACTURING□60

5.3.3□SYSTEM INTEGRATION□60

5.3.4□MARKETING AND SALES□60

5.3.5□APPLICATIONS□60

5.4□TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES□60

FIGURE 24□TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES□61

5.5□ECOSYSTEM MAPPING□61

TABLE 2□COMPANIES AND THEIR ROLE IN BUILDING AUTOMATION SYSTEM ECOSYSTEM□61

FIGURE 25□BUILDING AUTOMATION SYSTEM MARKET: ECOSYSTEM MAPPING□62

?

5.6□TECHNOLOGY ANALYSIS□63

5.6.1□AI-DRIVEN ANALYTICS□63

5.6.2□IP-BASED BUILDING AUTOMATION SYSTEMS□63

5.6.3□CLOUD-BASED FIRE PROTECTION SYSTEMS□63

5.6.4□THERMAL CAMERAS IN ACCESS CONTROL SYSTEMS□64

5.6.5□DIGITAL TWIN TECHNOLOGY IN BUILDING AUTOMATION□64

5.7□PORTER'S FIVE FORCES ANALYSIS□64

FIGURE 26□BUILDING AUTOMATION SYSTEM MARKET: PORTER'S FIVE FORCES ANALYSIS□65

FIGURE 27□IMPACT OF PORTER'S FIVE FORCES□65

TABLE 3□BUILDING AUTOMATION SYSTEM MARKET: PORTER'S FIVE FORCES ANALYSIS□66

5.7.1□INTENSITY OF COMPETITIVE RIVALRY□66

5.7.2□THREAT OF NEW ENTRANTS□66

5.7.3□THREAT OF SUBSTITUTES□66

5.7.4□BARGAINING POWER OF BUYERS□67

5.7.5□BARGAINING POWER OF SUPPLIERS□67

5.8□CASE STUDY ANALYSIS□67

5.8.1□IVY LEAGUE UNIVERSITY PARTNERED WITH BUILDINGS IOT TO INSTALL LEGACY BUILDING SYSTEMS□67

5.8.2□SANTA CLARA-BASED SOFTWARE COMPANY PARTNERED WITH BUILDINGS IOT TO INCREASE OPERATIONAL EFFICIENCY BY INTEGRATING DIFFERENT DATA STREAMS INTO SINGLE REPOSITORY, UPGRADING AND CUSTOMIZING ANALYTICS□68

5.8.3□HIPPODROME PARIS-LONGCHAMP (SPORTS FACILITY IN FRANCE) UTILIZED LDALI-ME204-U DALI CONTROLLERS OF LOYTEC TO

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STREAMLINE LIGHTING CONTROL AND ENHANCE EFFICIENCY	69
5.9 PATENT ANALYSIS	70
5.9.1 DOCUMENT TYPE	70
TABLE 4 PATENTS FILED AND GRANTED, 2013-2022	70
FIGURE 28 PATENTS APPLIED AND ISSUED, 2013-2022	70
5.9.2 PUBLICATION TREND	71
FIGURE 29 NUMBER OF PATENTS PUBLISHED EACH YEAR, 2013-2022	71
5.9.3 JURISDICTION ANALYSIS	71
FIGURE 30 JURISDICTION ANALYSIS, 2013-2022	71
5.9.4 TOP PATENT OWNERS	71
FIGURE 31 TOP 10 PATENT OWNERS FROM 2013 TO 2022	72
TABLE 5 TOP 20 PUBLISHED PATENT OWNERS IN LAST 10 YEARS	72
5.10 TRADE ANALYSIS	73
FIGURE 32 COUNTRY-WISE EXPORT DATA FOR PRODUCTS UNDER HS CODE 8415, 2018-2022	73
TABLE 6 EXPORT DATA FOR HS CODE 8415-COMPLIANT PRODUCTS, BY COUNTRY, 2018-2022 (USD THOUSAND)	73
FIGURE 33 COUNTRY-WISE IMPORT DATA FOR PRODUCTS CLASSIFIED UNDER HS CODE 8415, 2018-2022	74
TABLE 7 IMPORT DATA FOR HS CODE 8415-COMPLIANT PRODUCTS, BY COUNTRY, 2018-2022 (USD THOUSAND)	74
5.11 PRICING ANALYSIS	75
5.11.1 AVERAGE SELLING PRICE (ASP) OF FACILITY MANAGEMENT SYSTEMS OFFERED BY TOP THREE PLAYERS, 2022 (USD)	75
TABLE 8 AVERAGE SELLING PRICE (ASP) OF FACILITY MANAGEMENT SYSTEMS OFFERED BY TOP THREE PLAYERS, 2022 (USD)	75
TABLE 9 HISTORIC AVERAGE SELLING PRICE (ASP) OF HVAC CONTROLS OFFERED BY THREE KEY PLAYERS, 2019-2022 (USD)	75
5.11.2 INDICATIVE PRICING OF HVAC, BY REGION, 2022 (USD)	76
5.12 TARIFF ANALYSIS	76
TABLE 10 MFN TARIFF RELATED TO PRODUCTS INCLUDED UNDER HS CODE: 8415 EXPORTED BY CHINA, 2022	76
5.13 STANDARDS AND REGULATORY LANDSCAPE	76
5.13.1 STANDARD RELATED TO BUILDING AUTOMATION SYSTEMS	76
TABLE 11 BUILDING AUTOMATION SYSTEM MARKET: STANDARDS	76
5.13.2 REGIONAL REGULATORY BODIES, GOVERNMENT AGENCIES AND OTHER ORGANIZATIONS	77
TABLE 12 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	77
TABLE 13 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	79
TABLE 14 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	80
TABLE 15 ROW: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	81
5.14 KEY CONFERENCES AND EVENTS, 2023-2024	81
5.15 KEY STAKEHOLDERS AND BUYING CRITERIA	83
5.15.1 KEY STAKEHOLDERS IN BUYING PROCESS	83
FIGURE 34 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR THREE KEY APPLICATIONS	83
TABLE 16 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR THREE KEY APPLICATIONS (%)	83
5.15.2 KEY BUYING CRITERIA	83
FIGURE 35 KEY BUYING CRITERIA FOR TOP THREE APPLICATIONS	83
TABLE 17 KEY BUYING CRITERIA FOR THREE KEY APPLICATIONS	84
6 BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING	85
6.1 INTRODUCTION	86
FIGURE 36 BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING	86
FIGURE 37 SECURITY & ACCESS CONTROLS SEGMENT TO DOMINATE BUILDING AUTOMATION SYSTEM MARKET FROM 2023 TO 2028	87
TABLE 18 BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2019-2022 (USD MILLION)	87
TABLE 19 BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2023-2028 (USD MILLION)	87

?

6.2 FACILITY MANAGEMENT SYSTEMS 88

TABLE 20 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY SYSTEM TYPE, 2019-2022 (USD MILLION) 88

TABLE 21 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY SYSTEM TYPE, 2023-2028 (USD MILLION) 88

TABLE 22 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 89

TABLE 23 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 89

TABLE 24 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2019-2022 (USD MILLION) 89

TABLE 25 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2023-2028 (USD MILLION) 90

TABLE 26 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2019-2022 (USD MILLION) 90

TABLE 27 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2023-2028 (USD MILLION) 90

TABLE 28 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2019-2022 (USD MILLION) 91

TABLE 29 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2023-2028 (USD MILLION) 91

TABLE 30 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2019-2022 (USD MILLION) 91

TABLE 31 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2023-2028 (USD MILLION) 92

6.2.1 LIGHTING CONTROLS 92

6.2.1.1 Optimize energy efficiency and user comfort by intelligently managing and adjusting lighting levels 92

TABLE 32 BUILDING AUTOMATION SYSTEM MARKET, BY FACILITY MANAGEMENT SYSTEM TYPE, 2019-2022 (MILLION UNITS) 92

TABLE 33 BUILDING AUTOMATION SYSTEM MARKET, BY FACILITY MANAGEMENT SYSTEM TYPE, 2023-2028 (MILLION UNITS) 93

TABLE 34 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY LIGHTING CONTROL TYPE, 2019-2022 (USD MILLION) 93

TABLE 35 FACILITY MANAGEMENT SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY LIGHTING CONTROL TYPE, 2023-2028 (USD MILLION) 93

TABLE 36 LIGHTING CONTROL: FACILITY MANAGEMENT SYSTEMS MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 94

TABLE 37 LIGHTING CONTROL: FACILITY MANAGEMENT SYSTEMS MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 94

6.2.1.1.1 Occupancy sensors 95

6.2.1.1.2 Daylight sensors 95

6.2.1.1.3 Relays 95

6.2.1.1.4 Timers 95

6.2.1.1.5 Dimming actuators 96

6.2.1.1.6 Switch actuators 96

6.2.1.1.7 Blind/Shutter actuators 96

6.2.1.1.8 Transmitters 97

6.2.1.1.9 Receivers 97

6.2.2 HVAC CONTROLS 97

6.2.2.1 Enhance indoor comfort and energy efficiency by regulating system-based occupancy, temperature, and environmental conditions 97

TABLE 38 HVAC CONTROLS: FACILITY MANAGEMENT SYSTEMS MARKET, BY HVAC COMPONENT, 2019-2022 (USD MILLION) 98

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TABLE 39 HVAC CONTROLS: FACILITY MANAGEMENT SYSTEMS MARKET, BY HVAC COMPONENT, 2023-2028 (USD MILLION) 98

TABLE 40 HVAC CONTROLS: FACILITY MANAGEMENT SYSTEMS MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 99

TABLE 41 HVAC CONTROLS: FACILITY MANAGEMENT SYSTEMS MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 99

6.2.2.1.1 Sensors 99

6.2.2.1.2 Smart thermostats 99

6.2.2.1.3 Control valves 100

6.2.2.1.3.1 Three-way valves 100

6.2.2.1.4 Heating and cooling coils 100

6.2.2.1.5 Dampers 100

6.2.2.1.5.1 Low-leakage dampers 101

6.2.2.1.5.2 Parallel- and opposed-blade dampers 101

6.2.2.1.5.3 Round dampers 101

6.2.2.1.6 Actuators 101

6.2.2.1.6.1 Hydraulic actuators 102

6.2.2.1.6.2 Pneumatic actuators 102

6.2.2.1.6.3 Electric actuators 102

6.2.2.1.7 Pumps and fans 102

6.2.2.1.8 Smart vents 103

6.3 SECURITY AND ACCESS CONTROLS 103

TABLE 42 SECURITY AND ACCESS CONTROLS: BUILDING AUTOMATION SYSTEM MARKET, BY SYSTEM TYPE, 2019-2022 (USD MILLION) 103

TABLE 43 SECURITY AND ACCESS CONTROLS: BUILDING AUTOMATION SYSTEM MARKET, BY SYSTEM TYPE, 2023-2028 (USD MILLION) 103

TABLE 44 SECURITY AND ACCESS CONTROLS: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 104

TABLE 45 SECURITY AND ACCESS CONTROLS: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 104

TABLE 46 SECURITY AND ACCESS CONTROLS: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2019-2022 (USD MILLION) 104

TABLE 47 SECURITY AND ACCESS CONTROLS: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2023-2028 (USD MILLION) 105

TABLE 48 SECURITY AND ACCESS CONTROL: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2019-2022 (USD MILLION) 105

TABLE 49 SECURITY AND ACCESS CONTROL: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2023-2028 (USD MILLION) 105

TABLE 50 SECURITY AND ACCESS CONTROL: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2019-2022 (USD MILLION) 106

TABLE 51 SECURITY AND ACCESS CONTROL: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2023-2028 (USD MILLION) 106

TABLE 52 SECURITY AND ACCESS CONTROL: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2019-2022 (USD MILLION) 106

TABLE 53 SECURITY AND ACCESS CONTROL: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2023-2028 (USD MILLION) 107

6.3.1 VIDEO SURVEILLANCE SYSTEMS 107

6.3.1.1 Enable real-time monitoring and security and visual verification of events and deterrence of unauthorized access or incidents 107

TABLE 54 VIDEO SURVEILLANCE SYSTEMS: SECURITY AND ACCESS CONTROLS MARKET, BY PRODUCT, 2019-2022 (USD MILLION) 107

TABLE 55 VIDEO SURVEILLANCE SYSTEMS: SECURITY AND ACCESS CONTROLS MARKET, BY PRODUCT, 2023-2028 (USD

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MILLION)108

TABLE 56 VIDEO SURVEILLANCE SYSTEMS: SECURITY AND ACCESS CONTROLS MARKET, BY APPLICATION, 2019-2022 (USD MILLION)108

TABLE 57 VIDEO SURVEILLANCE SYSTEMS: SECURITY AND ACCESS CONTROLS MARKET, BY APPLICATION, 2023-2028 (USD MILLION)108

6.3.1.1.1 Hardware108

TABLE 58 SECURITY AND ACCESS CONTROLS: VIDEO SURVEILLANCE SYSTEMS MARKET FOR HARDWARE, BY PRODUCT, 2019-2022 (USD MILLION)109

TABLE 59 SECURITY AND ACCESS CONTROLS: VIDEO SURVEILLANCE SYSTEMS MARKET FOR HARDWARE, BY PRODUCT, 2023-2028 (USD MILLION)109

6.3.1.1.1.1 Cameras109

6.3.1.1.1.2 Monitors109

6.3.1.1.1.3 Storage systems110

6.3.1.1.1.4 Accessories110

6.3.1.1.2 Software/Video analytics110

6.3.1.1.3 Services110

6.3.2 BIOMETRIC SYSTEMS111

6.3.2.1 Enhance security through advanced access control and user identification based on unique physiological or behavioral traits111

TABLE 60 BIOMETRIC SYSTEMS: SECURITY & ACCESS CONTROLS MARKET, BY APPLICATION, 2019-2022 (USD MILLION)111

TABLE 61 BIOMETRIC SYSTEMS: SECURITY & ACCESS CONTROLS MARKET, BY APPLICATION, 2023-2028 (USD MILLION)111

6.4 FIRE PROTECTION SYSTEMS112

TABLE 62 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY COMPONENT, 2019-2022 (USD MILLION)112

TABLE 63 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY COMPONENT, 2023-2028 (USD MILLION)112

TABLE 64 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2019-2022 (USD MILLION)113

TABLE 65 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2023-2028 (USD MILLION)113

TABLE 66 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2019-2022 (USD MILLION)113

TABLE 67 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2023-2028 (USD MILLION)114

TABLE 68 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2019-2022 (USD MILLION)114

TABLE 69 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2023-2028 (USD MILLION)114

TABLE 70 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2019-2022 (USD MILLION)115

TABLE 71 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2023-2028 (USD MILLION)115

TABLE 72 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2019-2022 (USD MILLION)115

TABLE 73 FIRE PROTECTION SYSTEMS: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2023-2028 (USD MILLION)116

6.4.1 SENSORS AND DETECTORS116

6.4.1.1 Detect emergencies at initial stages to avoid accidents116

6.4.1.1.1 Smoke detectors116

6.4.1.1.2 Flame detectors116

6.4.1.1.3 Others116

6.4.2 FIRE SPRINKLERS117

6.4.2.1 Provide automatic fire suppression, enhancing safety and property protection in event of fire117

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6.4.3 FIRE ALARMS 117

6.4.3.1 Warn occupants about occurrence of fire breakouts 117

6.4.4 EMERGENCY LIGHTING, VOICE EVACUATION, AND PUBLIC ALERT DEVICES 117

6.4.4.1 Ensure safety by providing illumination, clear instructions, and timely alerts during critical situations 117

6.5 BUILDING ENERGY MANAGEMENT SOFTWARE 118

6.5.1 OPTIMIZES ENERGY CONSUMPTION, REDUCES COSTS, AND ENHANCES SUSTAINABILITY BY MONITORING, ANALYZING, AND CONTROLLING ENERGY USAGE 118

TABLE 74 BUILDING ENERGY MANAGEMENT SOFTWARE: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 118

TABLE 75 BUILDING ENERGY MANAGEMENT SOFTWARE: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 118

TABLE 76 BUILDING ENERGY MANAGEMENT SOFTWARE: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2019-2022 (USD MILLION) 119

TABLE 77 BUILDING ENERGY MANAGEMENT SOFTWARE: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2023-2028 (USD MILLION) 119

TABLE 78 BUILDING ENERGY MANAGEMENT SOFTWARE: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2019-2022 (USD MILLION) 120

TABLE 79 BUILDING ENERGY MANAGEMENT SOFTWARE: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2023-2028 (USD MILLION) 120

TABLE 80 BUILDING ENERGY MANAGEMENT SOFTWARE: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2019-2022 (USD MILLION) 120

TABLE 81 BUILDING ENERGY MANAGEMENT SOFTWARE: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2023-2028 (USD MILLION) 121

TABLE 82 BUILDING ENERGY MANAGEMENT SOFTWARE: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2019-2022 (USD MILLION) 121

TABLE 83 BUILDING ENERGY MANAGEMENT SOFTWARE: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2023-2028 (USD MILLION) 121

6.6 BUILDING AUTOMATION SYSTEM (BAS) SERVICES 122

TABLE 84 BAS SERVICES: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 122

TABLE 85 BAS SERVICES: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 122

TABLE 86 BAS SERVICES: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2019-2022 (USD MILLION) 122

TABLE 87 BAS SERVICES: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2023-2028 (USD MILLION) 123

TABLE 88 BAS SERVICES: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2019-2022 (USD MILLION) 123

TABLE 89 BAS SERVICES: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2023-2028 (USD MILLION) 123

TABLE 90 BAS SERVICES: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2019-2022 (USD MILLION) 124

TABLE 91 BAS SERVICES: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2023-2028 (USD MILLION) 124

TABLE 92 BAS SERVICES: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2019-2022 (USD MILLION) 124

TABLE 93 BAS SERVICES: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2023-2028 (USD MILLION) 125

6.6.1 INSTALLATION AND MAINTENANCE 125

6.6.1.1 Essential to guarantee effective functionality and prolonged operational life of BAS 125

6.6.2 TRAINING 125

6.6.2.1 Enables staff to effectively manage, monitor, and control BAS 125

6.7 OTHERS 125

TABLE 94 OTHERS: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 126

TABLE 95 OTHERS: BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 126

TABLE 96 OTHERS: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2019-2022 (USD MILLION) 126

TABLE 97 OTHERS: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2023-2028 (USD MILLION) 127

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TABLE 98	OTHERS: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2019-2022 (USD MILLION)	127
TABLE 99	OTHERS: BUILDING AUTOMATION SYSTEM MARKET FOR RESIDENTIAL, BY REGION, 2023-2028 (USD MILLION)	127
TABLE 100	OTHERS: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2019-2022 (USD MILLION)	128
TABLE 101	OTHERS: BUILDING AUTOMATION SYSTEM MARKET FOR COMMERCIAL, BY REGION, 2023-2028 (USD MILLION)	128
TABLE 102	OTHERS: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2019-2022 (USD MILLION)	128
TABLE 103	OTHERS: BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL, BY REGION, 2023-2028 (USD MILLION)	129
7	BUILDING AUTOMATION SYSTEM MARKET, BY COMMUNICATION TECHNOLOGY	130
7.1	INTRODUCTION	131
FIGURE 38	WIRELESS TECHNOLOGIES SEGMENT TO HOLD LARGER MARKET SHARE IN 2028	131
TABLE 104	BUILDING AUTOMATION SYSTEM MARKET, BY COMMUNICATION TECHNOLOGY, 2019-2022 (USD MILLION)	132
TABLE 105	BUILDING AUTOMATION SYSTEM MARKET, BY COMMUNICATION TECHNOLOGY, 2023-2028 (USD MILLION)	132
7.2	WIRELESS TECHNOLOGIES	133
7.2.1	ZIGBEE	133
7.2.1.1	Ideal for commercial and residential applications due to low power consumption and cost	133
7.2.2	ENOCAN	133
7.2.2.1	Pioneers battery-free building automation technology with energy harvesting feature	133
7.2.3	Z-WAVE	134
7.2.3.1	Engineered for automation of processes, enabling remote control of various devices and applications	134
7.2.4	WI-FI	135
7.2.4.1	Empowers seamless connectivity and control in building automation systems, enhancing efficiency and convenience	135
7.2.5	BLUETOOTH	135
7.2.5.1	Ideal for short-range communication in personal area networks (PANs)	135
7.2.6	THREAD	136
7.2.6.1	Enhances real-time control and monitoring of various building functions, optimizing energy efficiency and occupant comfort	136
7.2.7	INFRARED	136
7.2.7.1	Used for occupancy sensing and remote control, enhancing energy efficiency and user comfort	136
7.3	WIRED TECHNOLOGIES	137
7.3.1	DIGITAL ADDRESSABLE LIGHTING INTERFACE (DALI)	137
7.3.1.1	Used for precise control and management of lighting systems, enabling individual luminaire control and energy efficiency	137
7.3.2	KONNEX (KNX)	138
7.3.2.1	Standardized platform for managing and automating lighting, HVAC, security, and energy systems, promoting seamless integration and control	138
7.3.3	LONWORKS	138
7.3.3.1	Enables seamless communication and integration of various systems, improving efficiency and control of building functions	138
?		
7.3.4	BUILDING AUTOMATION AND CONTROL NETWORK (BACNET)	139
7.3.4.1	Streamlines communication and integration in building automation systems to enhance control and management of various building functions	139
7.3.5	MODBUS	140
7.3.5.1	Widely used communication protocol for facilitating data exchange among various devices and systems, enhancing control and monitoring capabilities	140
8	BUILDING AUTOMATION MARKET, BY APPLICATION	141
8.1	INTRODUCTION	142
FIGURE 39	BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION	142

FIGURE 40	INDUSTRIAL APPLICATION SEGMENT TO REGISTER HIGHEST CAGR FROM 2023 TO 2028	142
TABLE 106	BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2019-2022 (USD MILLION)	143
TABLE 107	BUILDING AUTOMATION SYSTEM MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	143
8.2	RESIDENTIAL	144
8.2.1	RIISING NUMBER OF INTERNET OF THINGS (IOT)-EQUIPPED SMART HOMES TO DRIVE DEMAND	144
8.2.1.1	DIY home automation	144
TABLE 108	RESIDENTIAL: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2019-2022 (USD MILLION)	145
TABLE 109	RESIDENTIAL: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2023-2028 (USD MILLION)	145
8.3	COMMERCIAL	146
8.3.1	OFFICE BUILDINGS	146
8.3.1.1	Growing use to enhance energy efficiency and occupant comfort in office buildings through centralized control of various systems to fuel segmental growth	146
8.3.2	RETAIL AND PUBLIC ASSEMBLY BUILDINGS	147
8.3.2.1	Rising adoption to optimize energy management and create comfortable, safe environments in retail and public assembly buildings to drive market	147
8.3.3	HOSPITALS AND HEALTHCARE FACILITIES	147
8.3.3.1	Need to improve patient care and operational efficiency in hospitals and healthcare facilities by regulating critical systems to drive demand	147
8.3.4	AIRPORTS AND RAILWAY STATIONS	148
8.3.4.1	Capability to enhance security, operational efficiency, and passenger comfort at airports and railway stations through intelligent control of various systems to fuel demand	148
TABLE 110	COMMERCIAL: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2019-2022 (USD MILLION)	148
TABLE 111	COMMERCIAL: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2023-2028 (USD MILLION)	149
8.4	INDUSTRIAL	149
8.4.1	INCREASING ADOPTION TO ACHIEVE ENERGY AND COST SAVINGS TO DRIVE MARKET	149
FIGURE 41	BUILDING ENERGY MANAGEMENT SOFTWARE SEGMENT TO REGISTER HIGHEST CAGR IN BUILDING AUTOMATION SYSTEM MARKET FOR INDUSTRIAL DURING FORECAST PERIOD	150
TABLE 112	INDUSTRIAL: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2019-2022 (USD MILLION)	150
TABLE 113	INDUSTRIAL: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2023-2028 (USD MILLION)	151
9	BUILDING AUTOMATION SYSTEM MARKET, BY REGION	152
9.1	INTRODUCTION	153
FIGURE 42	ASIA PACIFIC TO ACCOUNT FOR LARGEST SHARE OF BUILDING AUTOMATION SYSTEM MARKET IN 2028	153
TABLE 114	BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2019-2022 (USD MILLION)	153
TABLE 115	BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2023-2028 (USD MILLION)	154
9.2	NORTH AMERICA	154
FIGURE 43	NORTH AMERICA: BUILDING AUTOMATION SYSTEM MARKET SNAPSHOT	155
TABLE 116	NORTH AMERICA: BUILDING AUTOMATION SYSTEM MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	155
TABLE 117	NORTH AMERICA: BUILDING AUTOMATION SYSTEM MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	156
TABLE 118	NORTH AMERICA: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2019-2022 (USD MILLION)	156
TABLE 119	NORTH AMERICA: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2023-2028 (USD MILLION)	156
9.2.1	NORTH AMERICA: RECESSION IMPACT	157
9.2.2	US	157
9.2.2.1	Government-led initiatives aimed at conserving energy and reducing operational expenses	157
9.2.3	CANADA	158
9.2.3.1	Strong commitment to transition toward low-carbon economy	158
9.2.4	MEXICO	159

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9.2.4.1	Growing emphasis on constructing environmentally friendly buildings	159
9.3	EUROPE	160
FIGURE 44	EUROPE: BUILDING AUTOMATION SYSTEM MARKET SNAPSHOT	160
TABLE 120	EUROPE: BUILDING AUTOMATION SYSTEM MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	161
TABLE 121	EUROPE: BUILDING AUTOMATION SYSTEM MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	161
TABLE 122	EUROPE: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2019-2022 (USD MILLION)	161
TABLE 123	EUROPE: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2023-2028 (USD MILLION)	162
9.3.1	EUROPE: IMPACT OF RECESSION	162
9.3.2	UK	163
9.3.2.1	Technological advancements and rising infrastructure development	163
9.3.3	GERMANY	163
9.3.3.1	Presence of energy efficiency regulations and increasing demand for HVAC and lighting control systems in residential, commercial, and industrial sectors	163
9.3.4	FRANCE	164
9.3.4.1	Need to adhere to regulatory compliance and energy efficiency initiatives	164
9.3.5	ITALY	164
9.3.5.1	Growing demand for building automation systems in commercial and healthcare facilities	164
9.3.6	REST OF EUROPE	164
9.4	ASIA PACIFIC	165
FIGURE 45	ASIA PACIFIC: BUILDING AUTOMATION SYSTEM MARKET SNAPSHOT	165
FIGURE 46	INDIA TO REGISTER HIGHEST CAGR IN ASIA PACIFIC BUILDING AUTOMATION SYSTEM MARKET FROM 2023 TO 2028	166
TABLE 124	ASIA PACIFIC: BUILDING AUTOMATION SYSTEM MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	166
TABLE 125	ASIA PACIFIC: BUILDING AUTOMATION SYSTEM MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	166
TABLE 126	ASIA PACIFIC: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2019-2022 (USD MILLION)	167
TABLE 127	ASIA PACIFIC: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2023-2028 (USD MILLION)	167
9.4.1	ASIA PACIFIC: IMPACT OF RECESSION	168
9.4.2	CHINA	168
9.4.2.1	Rapid urbanization, economic growth, and development of smart cities	168
9.4.3	JAPAN	169
9.4.3.1	Commitment to sustainability and presence of strict environmental regulations	169
9.4.4	INDIA	169
9.4.4.1	Growing adoption in commercial and industrial sectors and surge in construction activities	169
9.4.5	SOUTH KOREA	170
9.4.5.1	Increasing emphasis on energy conservation and continued government-led initiatives to promote building automation systems	170
9.4.6	REST OF ASIA PACIFIC	171
9.5	ROW	171
FIGURE 47	SOUTH AMERICA TO REGISTER HIGHER CAGR IN ROW BUILDING AUTOMATION SYSTEM MARKET FROM 2023 TO 2028	171
TABLE 128	ROW: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2019-2022 (USD MILLION)	171
TABLE 129	ROW: BUILDING AUTOMATION SYSTEM MARKET, BY REGION, 2023-2028 (USD MILLION)	172
TABLE 130	ROW: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2019-2022 (USD MILLION)	172
TABLE 131	ROW: BUILDING AUTOMATION SYSTEM MARKET, BY OFFERING, 2023-2028 (USD MILLION)	172
9.5.1	ROW: IMPACT OF RECESSION	173
9.5.2	SOUTH AMERICA	173
9.5.2.1	Increased construction activities and need for energy-efficient building solutions	173
9.5.3	MIDDLE EAST & AFRICA	173

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9.5.3.1	Rapid urbanization and increasing construction activities	173
10	COMPETITIVE LANDSCAPE	174
10.1	OVERVIEW	174
10.2	KEY STRATEGIES ADOPTED BY MAJOR PLAYERS	174
FIGURE 48	BUILDING AUTOMATION SYSTEM MARKET: OVERVIEW OF KEY STRATEGIES ADOPTED BY LEADING PLAYERS, 2021-2023	174
10.3	MARKET SHARE ANALYSIS, 2022	175
TABLE 132	BUILDING AUTOMATION SYSTEM MARKET: DEGREE OF COMPETITION	175
FIGURE 49	BUILDING AUTOMATION SYSTEM MARKET SHARE ANALYSIS, 2022	176
10.4	REVENUE ANALYSIS, 2018-2022	179
FIGURE 50	BUILDING AUTOMATION SYSTEM MARKET: REVENUE ANALYSIS OF FOUR KEY COMPANIES, 2018-2022	179
10.5	COMPANY EVALUATION MATRIX, 2022	180
FIGURE 51	BUILDING AUTOMATION SYSTEM MARKET: COMPANY EVALUATION MATRIX, 2022	180
10.5.1	STARS	180
10.5.2	EMERGING LEADERS	181
10.5.3	PERVASIVE PLAYERS	181
10.5.4	PARTICIPANTS	181
10.6	COMPANY FOOTPRINT	181
TABLE 133	OVERALL COMPANY FOOTPRINT	181
TABLE 134	APPLICATION: COMPANY FOOTPRINT	182
TABLE 135	REGION: COMPANY FOOTPRINT	183
10.7	STARTUPS/SMALL AND MEDIUM-SIZED ENTERPRISES (SMES) EVALUATION MATRIX, 2022	184
FIGURE 52	BUILDING AUTOMATION SYSTEM MARKET: STARTUPS/SMES EVALUATION MATRIX, 2022	185
10.7.1	PROGRESSIVE COMPANIES	185
10.7.2	RESPONSIVE COMPANIES	185
10.7.3	DYNAMIC COMPANIES	186
10.7.4	STARTING BLOCKS	186
10.8	LIST OF KEY STARTUPS/SMES	186
TABLE 136	BUILDING AUTOMATION SYSTEM MARKET: LIST OF KEY STARTUPS/SMES	186
10.9	COMPETITIVE BENCHMARKING	187
TABLE 137	BUILDING AUTOMATION SYSTEM MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES	187
10.10	COMPETITIVE SCENARIOS AND TRENDS	187
10.10.1	PRODUCT LAUNCHES	187
TABLE 138	BUILDING AUTOMATION SYSTEM MARKET: PRODUCT LAUNCHES, 2022-2023	187
10.10.2	DEALS	191
TABLE 139	BUILDING AUTOMATION SYSTEM MARKET: DEALS, 2022-2023	191

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