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Commercial Building Automation Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

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Report description:

Commercial Building Automation Systems Market Analysis

The commercial building automation systems market is valued at USD 178.52 billion in 2025 and is forecast to reach USD 281.22 billion by 2030, expanding at a 9.51% CAGR. Demand accelerates because artificial intelligence now augments building controls, regulators tighten energy-efficiency mandates, and real-estate owners seek quantifiable ESG outcomes. Owners retrofit legacy stock to cut utility bills and to satisfy the European Union's zero-emission building targets, while North American tax incentives offset upfront costs. Rapid cloud adoption enables remote monitoring services, and green-bond issuances channel new capital into smart-building upgrades. Competitive intensity rises as traditional conglomerates integrate AI modules and start-ups pitch autonomous optimisation tools that promise double-digit energy savings.

Global Commercial Building Automation Systems Market Trends and Insights

Rising Energy-Efficiency Regulations

The revised Energy Performance of Buildings Directive obliges all new European buildings to meet zero on-site fossil-fuel emissions by 2030 and makes automation mandatory for non-residential systems above 70 kW. This single policy expands the commercial building automation systems market because owners must install smart controls to demonstrate compliance with the directive's Smart Readiness Indicator. Similar rules in California and Singapore mirror the European model, signalling global convergence toward compulsory automation. Investors interpret these mandates as de-risking signals, so capital flows shift toward projects that already embed advanced control platforms. Vendors now bundle compliance reporting dashboards with every new controller, reducing customer friction and accelerating upgrade cycles.

Mandatory ESG Reporting for Listed Real-Estate Trusts

REITs must disclose granular energy data under the EU Corporate Sustainability Reporting Directive and soon under proposed US SEC climate rules. Green bonds totalling USD 12 billion issued by REITs in 2024 require ongoing performance verification that legacy meters cannot deliver. As a result, the commercial building automation systems market becomes a compliance-driven procurement priority, transforming smart controls from optional efficiency upgrades into core fiduciary infrastructure. Cloud dashboards now provide automated audit trails that streamline annual sustainability reports and lower the cost of capital for owners with transparent energy metrics.

Cyber-Security Certification Gaps for Legacy BMS

Older building management systems seldom meet current cyber-security benchmarks. Owners must either fund expensive custom protections or accept elevated risk, delaying upgrade decisions. Healthcare operators face the sharpest dilemma because patient-critical systems cannot tolerate breaches yet must still hit energy targets. Standardisation efforts such as BACnet Secure Connect are helpful, but widespread retrofits demand capital and skilled integrators, both in short supply.

Other drivers and restraints analyzed in the detailed report include:

Convergence of OT and IT via BACnet / IPv6 / AI-Enabled Fault Detection & Diagnostics (FDD) / Shortage of Trained System Integrators /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

HVAC controls held 34.0% of 2024 revenue, the largest slice of the commercial building automation systems market. Energy-saving mandates and ageing chillers trigger retrofit waves. AI-enabled fault detection and diagnostics grows at 18.4% CAGR because predictive insights cut maintenance bills by up to 20%. Building management platforms gain traction as cloud migration centralises dashboards for ESG auditing. Security, lighting, and energy-metering systems integrate through common APIs, creating cross-selling openings.

The commercial building automation systems market size for AI-enabled modules is on course to almost triple by 2030 as algorithms become standard features on new controllers. Vendors embed self-learning models that recalibrate setpoints daily, delivering quick payback periods that appeal to cash-constrained owners. As interoperability improves, buyers increasingly favour holistic platforms able to orchestrate HVAC, lighting, blinds, and access across a single user interface.

Office buildings contributed 28.1% of revenue in 2024, reflecting an extensive installed base that now upgrades systems to meet hybrid-work comfort expectations. Healthcare's 13.6% CAGR is the fastest because infection-control guidelines demand precise air-exchange rates and humidity controls. A single US children's hospital saved USD 681,000 annually after automating its utility plant. Retail and hospitality chains adopt AI optimisation to match energy use with fluctuating occupancy, while universities invest in campus-wide upgrades tied to decarbonisation pledges.

The commercial building automation systems market size for healthcare facilities widens as funding programs offset capital costs for critical-care upgrades. Owners value real-time indoor-air-quality dashboards that help earn well-building accreditations and reduce liability. As these requirements tighten, vendors position integrated suites that bundle HVAC, lighting, and security into outcome-based service contracts.

Commercial Building Automation Systems Market Segmented by System Type (HVAC Control Systems, Building Management Platforms (BAS/BMS) and More), Building Type (Offices, Retail and Mixed-Use and More), Connectivity, Service Type (Consulting and Audit, Installation and Integration and Managed and Cloud Services) and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America led with 37.8% revenue share in 2024. Federal tax credits offset retrofit costs and mature distributor networks shorten delivery times. Ageing commercial stock and rising utility rates sustain upgrade demand.

The commercial building automation systems market in Asia-Pacific grows fastest at 11.8% CAGR. Rapid urbanisation in China and India drives new builds that specify smart controls from the blueprint stage. India's HVAC market alone is expected to reach USD 30 billion by 2030 and its 15.8% CAGR underpins automation uptake. China's smart-building standard GB/T 39190-2020 sets IoT requirements that increase baseline specifications for controls.

Europe remains a solid growth region as revised energy directives compel zero-emission targets and system integrations. Government retrofit funds subsidise sensors and analytics layers. South America and the Middle East and Africa show emerging potential tied to commercial construction booms and rising awareness of green-building certifications. Multinationals acquire regional distributors to secure early mover advantage, as evidenced by ABB's USD 150 million wiring-accessory buy in China.

List of Companies Covered in this Report:

Siemens AG / Schneider Electric SE / Johnson Controls International plc / Honeywell International Inc. / ABB Ltd. / Robert Bosch GmbH (Bosch Building Technologies) / Mitsubishi Electric Corporation / Delta Electronics Inc. / Legrand SA / Trane Technologies plc / Rockwell Automation Inc. / Emerson Electric Co. / Cisco Systems Inc. / Fortive Corporation (Buildings IoT) / Distech Controls Inc. / Phoenix Contact GmbH and Co. KG / Advantech Co. Ltd. / Yokogawa Electric Corporation / Omron Corporation / Endress+Hauser Group Services AG /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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