Building Energy Management Systems (BEMS) - Global Strategic Analysis

Description: This report analyzes the worldwide markets for Building Energy Management Systems (BEMS) in US$ Million. The report provides separate comprehensive analytics for the US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa, and Latin America.

Annual estimates and forecasts are provided for the period 2013 through 2020. Market data and analytics are derived from primary and secondary research. Company profiles are primarily based on public domain information including company URLs.

The report profiles 77 companies including many key and niche players such as:

- ABB Group
- Azbil Corporation
- BuildingIQ
- C3 Energy
- Carma Industries Inc.

Contents:

I. INTRODUCTION, METHODOLOGY & PRODUCT DEFINITIONS
- Study Reliability and Reporting Limitations
- Disclaimers
- Data Interpretation & Reporting Level
- Quantitative Techniques & Analytics
- Product Definition and Scope of Study

II. EXECUTIVE SUMMARY

1. INDUSTRY OVERVIEW
- Energy Management Technologies Address Pressing Need to Curb Energy Usage and Carbon Footprint
- Table 1: Worldwide Energy Efficiency Solutions Market by End-Use Sector (2015E): Percentage Breakdown of Value Sales for Buildings, Industry, Transport, and Others (includes corresponding Graph/Chart)
- Spiraling Demand for Electricity
- The Underlying Factor Spurring Need for Efficient Energy Management
- Table 2: Projected Global Demand for Primary Energy (Mtoe) and Electricity (MWh): 2015, 2020, 2025, 2030 & 2035 (includes corresponding Graph/Chart)
- Table 3: Estimated Global Power Generation Infrastructure Requirement (in US$ Billion) for China, India, Latin America, and North America over the Period 2010-2030 (includes corresponding Graph/Chart)
- Outlook
- North America and Europe Dominate Global BEMS Market
- Emerging Economies Led by Asia-Pacific to Dictate Growth Momentum

2. GROWTH DRIVERS, TRENDS & ISSUES
- Regulatory Pressure to Curb Energy Wastage and Carbon Emissions
- A Major Growth Driver
- Table 4: Green Buildings Market (2013): Percentage Share Breakdown of Revenues by Construction Sector (includes corresponding Graph/Chart)
- BEMS Plays Key Role in Green Building Movement
- Table 5: Global Energy Consumption by Sector (2013): Percentage Breakdown of Energy Consumption for Commercial, Industrial, Residential, and Transportation (includes corresponding Graph/Chart)
- Implementation of Smart Buildings and Smart Cities Boosts Prospects for BEMS
- BEMS Proves a Cost-Effective Option for Interfacing Smart Buildings Effectively With Smart Grids
- Table 6: Global Smart Grid Capital Expenditure (CAPEX) by Application (2013-2020): Percentage Share Breakdown of CAPEX for AMI/Smart Meters, Communications Infrastructure, Distribution Automation, Information Technology Systems, Substation Automation, and Others (includes corresponding Graph/Chart)
- Emergence of IoT and Cloud Infrastructure

Emerging Economies Led by Asia-Pacific to Dictate Growth Momentum
A Potential Game Changer for BEMS Market
Small and Medium Buildings Present a Lucrative Untapped Market for BEMS
Falling Hardware Costs, and Managed BEMS Services to Overcome Cost and Complexity Hurdles

3. COMPETITIVE LANDSCAPE
Building Energy Management Ecosystem Emerges as Convergence Point for Multiple Industries
Market Leaders Shape BEMS’ Competitive Landscape
Intense Competition Catalyzes Innovation
BEMS Creates Opportunities for Big Data Analytics for Buildings
Vendors Step up Focus on Marketing Offerings
ESCOs Well Positioned to Capture BEMS Market
Opportunities Exist for Synergies among BEMS, BACS, BMS Vendors
BEMS Vendors, System Integrators Join Hands with ESCOs, Software Providers to Deliver EEM Systems

4. GOVERNMENT REGULATIONS & STANDARDS
AN OVERVIEW
Green Building Standards and Regulations
LEED Certification
Green Globes®: An Alternative to LEED Certification
LEED Vs Green Globes
Government Mandates for Energy Efficiency
Focus on Green Certification Programs for Individual Building Elements

5. PRODUCT OVERVIEW
Building Energy Management Systems (BEMS)
BEMS Components
BEMS Central Station
BEMS Outstations
Sensors
Modems
Local Area Network (LAN)
Advantages of BEMS
Optimization of Plant Operations
Improves Communication
Monitoring Plant Status
Energy Savings
Commissioning New Plants
Automated Switching On/Off Plant
Key Concerns with BEMS

6. PRODUCT INTRODUCTIONS
Echelon Unveils New Lumewave 5.0
GridPoint Launches New GridPoint Energy Manager
ABB Launches SlimLine XR ITS2
EnerNOC Introduces Novel Platform Capabilities
EnerNOC Unveils New Energy Intelligence Software Platform
Trend Introduces new Room View Sensor and Display Solution
Trend Launches New IQ®4E Controller
Azbil Announces Development of Savic-net
Daintree Networks Introduces Cloud-Based Building Energy Management System
ABB Launches Emax 2 Ekip Power Controller
Optimum Energy Unveils OptiCx™ Platform
Elster EnergyICT Launches Enacto 9.3
Elster EnergyICT Introduces Enacto
IMServ Unveils IMServ Control 10
NEC Introduces New Cloud-Based BEMS
Daikin Launches the Intelligent Touch Manager (iTM)
Daintree Networks Launches New ControlScope 3.0

7. RECENT INDUSTRY ACTIVITY
Twenty First Century Utilities Acquires GridPoint
EnerNOC Takes Over World Energy Solutions
Ecova Acquires Retroficiency
Cenex Launches EFES Project
IBM Inks Partnership with Carnegie Mellon for Cloud-Based Analytics System
Higher Education Institutions across the US Deploy BuildingIQ’s Energy Management Software
BuildingIQ Partners with Xcel Energy
BuildingIQ Deploys PEO Platform to BSA Group
CGS Selects BuildingIQ to Deploy PEO Platform for Public Buildings in District of Columbia
Deco Lighting Partners with Daintree Networks
Daintree Networks Inks Partnership with CLTC
EnerNOC Inks Partnership with GridPoint to Provide Integrated Energy Management Solution
Dow Corning Deploys Energy Intelligence Software Platform of EnerNOC
Ergon Energy to Expand Enernoc’s Software Deployment to Ergon Energy Commercial Customer Base
SmartestEnergy Chooses EnerNOC’s EIS Platform
GridPoint Inks Partnership with Axiom Energy Solutions
Matalan Installs BEMS from Wireless Energy Management Systems International
EnerNOC Acquires Pulse Energy
SSE Takes Over ESG from BDC
TSSP and Smi-Enerpro Forms JV for Energy Efficient Platform
Bouygues Immobilier Enters into Partnership with Steria for Si@go
US GSA Selects BuildingIQ’s Energy Management Software for Green Proving Ground Program
BuildingIQ Integrates Technologies with SkyFoundry’s Sky Spark to Offer BEMS for Mount Pleasant Shopping Centre
EnerNOC Inks Demand Manager Contract with BKW Energy
GridPoint Collaborates with MicroStrategy for Enhanced Energy Management Platform
GridPoint Enters Into Partnership with CDP
Oracle Enters Into Partnership with Hitachi for BEAM Solution
Elster EnergyICT Inks Contract with Tesco
Carbon Numbers Acquires Eco Control Systems
BuildingIQ and S4 Group Collaborates to Identify Energy Saving for Commercial Office Space
ITOCHU to Introduce EMS to Direct Dealers of Mitsubishi Fuso
PCS Inks Partnership with Berkeley Lab to Develop Technology to Minimize Energy Usage in Buildings

8. FOCUS ON SELECT PLAYERS
ABB Group (Switzerland)
Azbil Corporation (Japan)
BuildingIQ (Australia)
C3 Energy (USA)
Carma Industries Inc. (Canada)
Cylon Active Energy (Ireland)
Daikin Industries Ltd. (Japan)
Daintree Networks, Inc. (USA)
Echelon Corp. (USA)
Ecova, Inc. (USA)
Elster EnergyICT (Germany)
EnerNOC, Inc. (USA)
eSight Energy (UK)
FirstFuel Software, Inc. (USA)
GridPoint, Inc. (USA)
Honeywell International, Inc. (USA)
IBM Corporation (USA)
Ingersoll-Rand PLC (Ireland)
Johnson Controls, Inc. (USA)
Jones Lang LaSalle Incorporated (USA)
Optimum Energy LLC (USA)
Schneider Electric SE (France)
Siemens AG (Germany)
SkyFoundry LLC (USA)
Toshiba Corporation (Japan)
Verisae (Israel)

9. GLOBAL MARKET PERSPECTIVE
Table 7: World Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa, and Latin American Markets Independently
Analyzed with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding
Graph/Chart)
Table 8: World 8-Year Perspective for Building Energy Management Systems (BEMS) by Geographic Region
Percentage Share Breakdown of Revenues for US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa,
and Latin American Markets for Years 2013, 2015 and 2020 (includes corresponding Graph/Chart)

III. MARKET

1. THE UNITED STATES
A. Market Analysis
Energy Conservation Regulations Propel Adoption of BEMS
Table 9: Average Energy Usage in US Buildings by Type of System (2015): Percentage Breakdown of Unit
Consumption of Energy for HVAC Systems, Kitchen Appliances, Lighting, Office Equipment, Water, and
Others (includes corresponding Graph/Chart)
List of Green Building Codes/Projects in Select States of the US
LEED Projects
Table 10: LEED Projects Certification and Registrations (As of February 2014)
ICC-700 National Green Building Standard
Strong Affinity for Innovative Technologies Bolsters Prospects for US BEMS Market
Product Introductions
Strategic Corporate Developments
Select Key Players
B. Market Analytics
Table 11: US Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with
Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

2. CANADA
A. Market Analysis
Current and Future Analysis
Key Player
B. Market Analytics
Table 12: Canadian Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with
Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding
Graph/Chart)

3. JAPAN
A. Market Analysis
BEMS Address Need for Reducing Exorbitant Power Bills
Product Introductions
Strategic Corporate Development
Key Players
B. Market Analytics
Table 13: Japanese Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with
Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding
Graph/Chart)

4. EUROPE
A. Market Analysis
Regulatory Push and Technological Advancements to Boost Momentum of European BEMS Market
Table 14: Energy Consumption in Europe (2014E): Percentage Share Breakdown of Energy Demand by Sector
Buildings, Industrial and Transportation (includes corresponding Graph/Chart)
Table 15: Average Energy Usage in European Service Sector Buildings (2015): Percentage Breakdown of Unit
Consumption of Energy for Lighting, Space Heating, Ventilation & Cooling, Water Heating, Other Electric
Systems, and Others (includes corresponding Graph/Chart)
Target Dates for Energy Efficiency Buildings for Select EU Member Countries
B. Market Analytics
Table 16: European Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) by Geographic Region
France, Germany, Italy, UK, Spain, Russia, and Rest of Europe Markets Independently Analyzed with Annual
Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 17: European 8-Year Perspective for Building Energy Management Systems (BEMS) by Geographic Region
Percentage Share Breakdown of Revenues for France, Germany, Italy, UK, Spain, Russia, and Rest of Europe Markets for Years 2013, 2015 and 2020 (includes corresponding Graph/Chart)

4a. FRANCE
A. Market Analysis
   Current and Future Analysis
   Strategic Corporate Development
   Key Player
B. Market Analytics
   Table 18: French Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

4b. GERMANY
A. Market Analysis
   Current and Future Analysis
   Select Key Players
B. Market Analytics
   Table 19: German Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

4c. ITALY
   Market Analysis
   Table 20: Italian Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

4d. THE UNITED KINGDOM
A. Market Analysis
   Current and Future Analysis
   Growing Consumer Awareness and Government Regulations Power BEMS Market
   Product Introductions
   Strategic Corporate Developments
   Key Player
B. Market Analytics
   Table 21: UK Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

4e. SPAIN
   Market Analysis
   Table 22: Spanish Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

4f. RUSSIA
   Market Analysis
   Table 23: Russian Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

4g. REST OF EUROPE
A. Market Analysis
   Current and Future Analysis
   Product Introductions
   Strategic Corporate Developments
   Select Key Players
B. Market Analytics
   Table 24: Rest of Europe Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

5. ASIA-PACIFIC
Market Analysis

Table 25: Asia-Pacific Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) by Geographic Region
China, South Korea, and Rest of Asia-Pacific Markets Independently Analyzed with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 26: Asia-Pacific 8-Year Perspective for Building Energy Management Systems (BEMS) by Geographic Region
Percentage Share Breakdown of Revenues for China, South Korea, and Rest of Asia-Pacific Markets for Years 2013, 2015 and 2020 (includes corresponding Graph/Chart)

5a. CHINA
A. Market Analysis
Expanding Green Buildings Market to Promote Uptake of BEMS Solutions
B. Market Analytics
Table 27: Chinese Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

5b. SOUTH KOREA
Market Analysis
Table 28: South Korean Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

5c. REST OF ASIA-PACIFIC
A. Market Analysis
Current and Future Analysis
India Presents a Nascent, Albeit Opportune Market
Strategic Corporate Developments
Key Player
B. Market Analytics
Table 29: Rest of Asia-Pacific Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

6. MIDDLE EAST & AFRICA
A. Market Analysis
Current and Future Analysis
Move towards Green Buildings, Mega Smart City Projects Portends Good Fortunes for BEMS Market
Key Player
B. Market Analytics
Table 30: Middle East & Africa Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

7. LATIN AMERICA
A. Market Analysis
Current and Future Analysis
Uptrend in Green Building Projects in Latin America
B. Market Analytics
Table 31: Latin American Recent Past, Current & Future Analysis for Building Energy Management Systems (BEMS) with Annual Revenue Figures in US$ Million for Years 2013 through 2020 (includes corresponding Graph/Chart)

IV. COMPETITIVE LANDSCAPE
Total Companies Profiled: 77 (including Divisions/Subsidiaries 86)
The United States (28)
Canada (3)
Japan (10)
Europe (33)
- France (3)
- Germany (2)
- The United Kingdom (21)
- Spain (1)
- Rest of Europe (6)
Asia-Pacific (Excluding Japan) (10)
Middle East (2)

Ordering:
Order by Fax - using the form below
Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Building Energy Management Systems (BEMS) - Global Strategic Analysis
Web Address: http://www.researchandmarkets.com/reports/3619373/
Office Code: SCH3SY1U

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) -</td>
<td></td>
</tr>
<tr>
<td>Single User:</td>
<td>USD 4500</td>
</tr>
<tr>
<td>1 - 5 Users:</td>
<td>USD 6300</td>
</tr>
<tr>
<td>1 - 10 Users:</td>
<td>USD 8550</td>
</tr>
<tr>
<td>1 - 15 Users:</td>
<td>USD 10800</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [ ] Mr [ ] Mrs [ ] Dr [ ] Miss [ ] Ms [ ] Prof
First Name: __________________________________________ Last Name: _______________________________
Email Address: * ______________________________________
Job Title: __________________________________________
Organisation: ________________________________________
Address: ___________________________________________
City: _______________________________________________
Postal / Zip Code: ___________________________________
Country: ___________________________________________
Phone Number: ______________________________________
Fax Number: ________________________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ________________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World