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United States Building Automation System Market Assessment, By Component [Hardware, Software], By Application [HVAC Control Systems, Lighting Control Systems, Electronic Security & Safety, Building Energy Management System], By Communication Technology [Wired, Wireless, Others], By End-user [Commercial, Industrial, Residential], By Sales Channel [Direct, Channel], By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

United States building automation system market size was valued at USD 17.5 billion in 2022, expected to reach USD 30.98 billion in 2030, with a CAGR of 7.4% for the forecast period between 2023 and 2030. Building Automation System (BAS) is a hardware and software network that controls and monitors a building's mechanical and electrical equipment, optimizing operations, reducing energy consumption, and enhancing occupant comfort and safety. The United States BAS market is growing due to the demand for energy-efficient buildings, government initiatives promoting sustainable solutions, and advancements in IoT technology. BAS technology is becoming more accessible and affordable, making it attractive for building owners and managers. The US government has introduced regulations like the Energy Policy Act of 2005 and the Energy Independence and Security Act of 2007 to encourage the adoption of sustainable building solutions, leading to increased adoption of BAS systems in government and commercial buildings.

For instance, in March 2023, Building Controls & Solutions ('BCS') announced their strategic collaboration with Minvalco, a prominent supplier of building automation

systems and components in Minneapolis, Minnesota. Through this partnership, Minvalco will contribute substantial control system expertise to the BCS team in Minnesota and Wisconsin, leading to expanded coverage and improved customer service throughout the United States. This acquisition aligns with BCS's ongoing strategy to strengthen its prominent position in the North American building automation market.

Rise in Focus for Designing and Establishing Energy Efficient & Eco-Friendly Building

The US building automation systems market is growing due to the focus on energy-efficient and environment-friendly buildings. Key factors include rising energy costs, sustainable construction regulations, and enhanced performance. Building automation systems, equipped with sensors, controls, and software, optimize energy consumption and minimize environmental impact, enabling efficient management of building functions like lighting, heating, ventilation, and air conditioning.

The adoption of building automation systems has been further accelerated by the proliferation of smart and connected devices and the increasing integration of the Internet of Things (IoT) in building management. For instance, in June 2022, Siemens Smart Infrastructure introduced Building X, a cutting-edge smart building suite operating on a fully cloud-based platform, designed with a focus on openness and interoperability. This suite represents the inaugural release in the next generation of offerings, aligned with the principles of Siemens Xcelerator, an open digital business platform. The Siemens Xcelerator platform aims to expedite digital transformation and value creation across various sectors, including industry, transportation, energy grids, and buildings.

Growing Demand for Cloud Based Building Automation Systems

In the United States building automation systems market, there is a notable surge in demand for cloud-based solutions due to their multifaceted benefits. With buildings becoming increasingly complex and interconnected, cloud-based automation systems provide unmatched scalability, flexibility, and accessibility. They enable real-time monitoring, control, and data analytics from any location, enhancing energy management, occupant comfort, and overall building efficiency. The trend is driven by the need for more efficient and sustainable building operations, aligning with the growing importance of smart, interconnected buildings in the modern landscape.

Furthermore, the cloud-based approach reduces the necessity for extensive on-site hardware, rendering it both cost-effectiveness and sustainability. With the increasing

prominence of smart buildings and the growing emphasis on energy efficiency and sustainability, the United States is substantially transitioning towards cloud-based building automation systems. These systems are ushering in an era of smarter, more interconnected, and environmentally responsible buildings, aligning with the evolving demands of the market.

Increasing Focus on Security Promotes the Market

The United States building automation systems market is rapidly expanding, driven by emerging technologies and the increasing demand for energy-efficient and sustainable buildings. However, this heightened connectivity and automation expose these systems to new security risks. With growing interconnectivity, the vulnerability of these systems for cyberattacks becomes more significant. Therefore, it is paramount to intensify the focus on security measures within the United States building automation systems market. This involves the implementation of robust security protocols, regular software and hardware updates, and thorough employee training to reduce the risk of human errors. Building owners and operators must conduct routine security audits and assessments to identify and promptly address potential vulnerabilities. By prioritizing security in the building automation systems market, we can safeguard these systems against cyber threats, ensuring a safer and more secure built environment. For instance, in July 2023, Bosch announced its intention to acquire Paladin Technologies, Inc., a well-known security systems integration company in North America renowned for its expertise in security and life safety solutions.

Government Schemes

Several government schemes and initiatives in the United States have promoted the adoption of building automation systems (BAS) and enhanced energy efficiency in buildings. Here are some key initiatives and programs:

> LEED (Leadership in Energy and Environmental Design) is recognized as the world's most widely adopted green building rating system. It provides a framework for creating environmentally friendly, highly efficient, and economically beneficial green buildings that offer advantages in environmental stewardship, community well-being, and good governance. Achieving LEED certification is internationally acknowledged as a symbol of sustainability achievement, with dedicated organizations and individuals acting as transformative forces in the market to support it.

Better Buildings Initiative: The Better Buildings initiative, spearheaded by the United States Department of Energy (DOE), is committed to enhancing the quality of life for the American population by championing advancements in energy technology. Under this initiative, the DOE collaborates with public and private leaders to improve energy efficiency in the nation's homes, commercial buildings, and industrial facilities. It is accomplished by accelerating investments and sharing effective best practices across various sectors.

Impact of COVID-19

The COVID-19 pandemic significantly impacted the United States Building Automation System (BAS) market. With the sudden shutdown of non-essential businesses and the widespread adoption of remote work, the demand for building automation systems increased as the building owners and operators moved to optimize their building's energy efficiency and reduced costs. Additionally, the pandemic increased the demand for touchless technology, such as automated doors and occupancy sensors, which has driven the growth of BAS solutions. However, supply chain disruptions and labor shortages have caused delays in construction projects and installations, hindering the growth of the BAS market. Overall, the pandemic had both positive and negative impact on the BAS market in the United States, with the long-term effects still uncertain.

Key Players Landscape and Outlook

The United States building automation systems market is highly competitive and fragmented, with major players vying for market share. The companies offer a range of building automation solutions, including HVAC systems, lighting control, energy management, and security systems. In addition to these large players, there are smaller players in the market who specialize in the market of niche solutions or specific regions. With increasing demand for energy-efficient and sustainable buildings, the competition is expected to intensify in the coming years.

In March 2023, Siemens introduced the Connect Box, a smart Internet of Things (IoT) solution for managing small to medium-sized buildings. This user-friendly tool is a part of Siemens Smart Infrastructure which enhances building performance monitoring and is the latest addition to the Siemens Xcelerator product lineup. It can improve energy efficiency by up to 30% and significantly enhance indoor air quality in schools, retail stores, apartments, or small offices. Siemens Xcelerator, an open digital business platform, empowers customers to drive large-scale digital transformations efficiently.

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In June 2022, Accenture and Johnson Controls announced their partnership to establish and oversee two innovative OpenBlue Innovation Centers. These centers will aid in advancing Johnson Controls' adoption of building control system solutions, leveraging technologies such as artificial intelligence (AI), digital twins, the Internet of Things (IoT), 5G, and cloud computing. The primary aim is to expedite the integration of advanced automation in building operations, ultimately promoting enhanced sustainability, safety, security, and user experiences.

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