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Global Digital Substation Merging Unit Market Growth 2026-2032

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Abstracts

The global Digital Substation Merging Unit market size is predicted to grow from US$ 359 million in 2025 to US$ 525 million in 2032; it is expected to grow at a CAGR of 5.6% from 2026 to 2032.

Digital Substation Merging Unit refers to a process-level intelligent electronic device that acquires current and voltage signals from conventional instrument transformers, low-power instrument transformers or compatible digital sensors, performs synchronized sampling and data processing, and publishes standardized Sampled Values to protection, control, metering, disturbance-recording and power-quality devices through an Ethernet process bus. The studied products principally cover Dedicated Stand-Alone Merging Units and Integrated Process Interface Units. Stand-alone products focus on analog acquisition, synchronization and Sampled Value transmission, while integrated products combine merging-unit functionality with binary input and output, GOOSE messaging, switchgear control and, in selected configurations, backup protection, metering or recording. Core technical characteristics include support for IEC 61850-9-2 or IEC 61869-9 profiles, deterministic time synchronization, redundant Ethernet communications, conventional CT and VT inputs, LPIT compatibility and sampling profiles designed for protection or high-resolution measurement. The research scope focuses on commercially supplied hardware products used in distribution feeder bays, transmission line bays, power transformer bays, busbar-voltage applications, revenue metering and power-quality monitoring within new-build and modernized digital substations.

Key Findings

Global shipments reached approximately 48.1 thousand units in 2025

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Average selling price was approximately US$7,640 per unit in 2025

2026 shipments are projected at approximately 50.4 thousand units

Twenty validated manufacturers define the core competitive supplier base

Dedicated stand-alone units retain the larger global volume base

Market Trends

The Digital Substation Merging Unit market is shifting from single-function signal digitization toward modular process-interface platforms that combine analog acquisition, binary input and output, switchgear control, protection support, metering and disturbance recording. Utilities increasingly prefer products that support both established IEC 61850-9-2 implementations and newer IEC 61869-9 profiles, enabling phased migration without replacing the entire secondary system. Hybrid interfaces capable of accepting conventional CT and VT signals as well as LPIT data are becoming more relevant for brownfield modernization, where legacy primary equipment and new digital sensors coexist. Product differentiation is also moving toward redundant PRP and HSR networking, precision time synchronization, higher-resolution measurement streams, cybersecurity controls and browser-based commissioning tools. These changes increase the value contribution of software, configuration and system engineering, while reducing copper cabling and expanding the number of protection, metering and monitoring functions that can be served by one process-level device.

Market Dynamics

Drivers

Growth is supported by continued transmission and distribution investment, renewable-energy interconnection, electrification, data-center load growth and the need to extract more capacity and operational visibility from existing grids. The International Energy Agency indicates that grid investment must accelerate materially through 2030 and that a substantial volume of renewable generation, storage and large-load projects remains in connection queues. Within substations, process-bus architectures reduce long copper runs, lower the burden on instrument transformers and allow protection and control devices to share standardized digital measurements. These operating and engineering benefits support adoption in both new digital substations and selective upgrades of

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conventional installations.

Restraints

Market expansion is constrained by long utility qualification cycles, the high engineering cost of changing protection architectures and the requirement to demonstrate deterministic performance under fault, redundancy and communication-failure conditions. Brownfield projects must often integrate equipment from different generations, vendors and standard profiles, increasing configuration and commissioning complexity. The economic case is also less immediate in smaller substations where existing copper wiring remains serviceable. Although IEC standards provide a common technical foundation, utilities still apply different cybersecurity, time-synchronization, redundancy and testing requirements, limiting the use of fully standardized global configurations. The cost of conformance testing, type testing, project-specific engineering and specialist commissioning therefore remains an important barrier, particularly for smaller manufacturers and price-sensitive markets.

Opportunities

The largest opportunity lies in staged digitalization of existing substations rather than replacement of complete primary systems. Stand-alone units that digitize conventional CT and VT outputs allow utilities to adopt process-bus protection while retaining installed transformers and switchgear. Hybrid products compatible with LPIT signals create an additional pathway toward digital instrument transformers and compact switchgear. Integrated process-interface units can capture higher value in transformer bays, breaker-and-a-half schemes, revenue-metering installations and power-quality applications because one platform can replace several separate interface and recording devices. Emerging markets with expanding transmission networks offer unit-volume opportunities, while mature markets provide demand for cybersecurity upgrades, high-resolution monitoring, redundancy and lifecycle replacement.

Challenges

The industry must manage interoperability risk across protection relays, merging units, clocks, Ethernet switches and engineering tools supplied by different manufacturers. A technically compliant device can still require substantial project-level validation before utilities accept it in protection-critical applications. Firmware maintenance, certificate management and long product lifecycles create additional obligations because substation assets are expected to remain supported much longer than typical

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commercial electronics. Manufacturers also face uneven regional specifications, limited public disclosure of product-level demand and volatile project timing. Integrated products improve functionality but increase software complexity and the consequences of a common-device failure, requiring robust redundancy, secure firmware, disciplined configuration management and clearly defined fallback operation.

Industry Chain Analysis

The upstream segment supplies precision analog front ends, analog-to-digital converters, processors, FPGA devices, isolation components, time-synchronization modules, industrial Ethernet interfaces, optical transceivers, power supplies, connectors and rugged enclosures. These inputs must meet accuracy, electromagnetic-compatibility, temperature, insulation and long-lifecycle requirements that are more stringent than those of ordinary industrial electronics. Component cost is important, but product value depends more heavily on measurement algorithms, deterministic communication, firmware reliability, cybersecurity, conformance testing and application engineering.

Midstream manufacturers integrate hardware, embedded software and IEC data models into stand-alone merging units or process-interface platforms, then complete type testing, interoperability validation and utility qualification. Downstream customers include transmission and distribution utilities, industrial power users, switchgear manufacturers, substation automation contractors and engineering companies. Value is created by converting primary measurements into reliable standardized data, reducing field wiring, simplifying secondary-system expansion and allowing multiple protection, control and monitoring applications to use the same synchronized data stream. Profitability is therefore influenced not only by hardware scale, but also by installed engineering tools, utility approvals, project references, technical support and the ability to maintain products throughout extended grid-asset lifecycles.

Segment Insights

Dedicated Stand-Alone Merging Units retain the larger volume base because they provide a relatively direct route for digitizing conventional CT and VT signals without redesigning the complete bay-control architecture. They are particularly relevant to brownfield modernization, distributed feeder applications and projects requiring separation between measurement acquisition and switchgear control. This segment is generally more price-sensitive and competes through channel count, accuracy, mounting flexibility, protocol support and ease of integration.

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Integrated Process Interface Units represent a smaller but strategically higher-value segment. These products combine merging, remote input and output, GOOSE control, switchgear interfaces and optional metering, recording or backup protection. Their economic advantage becomes stronger in complex transmission bays and compact digital switchyards where eliminating separate devices, copper wiring and engineering interfaces can offset a higher unit price. Hybrid input architectures and dual-profile support are expected to gain importance because they accommodate mixed fleets of conventional instrument transformers and LPIT-based equipment.

Downstream Market Opportunities

Transmission-line and power-transformer bays offer the strongest value opportunity because they require high availability, multiple current and voltage channels, redundancy and close coordination with protection systems. Distribution-feeder applications provide broader unit potential, particularly where compact devices can serve two feeders or integrate directly into switchgear cabinets. Busbar-voltage applications favor smaller form factors, while revenue metering and power-quality monitoring support premium configurations with higher accuracy and sampling performance. The most attractive downstream projects are those in which reduced copper wiring, simplified panel engineering, improved measurement sharing and faster future expansion can be quantified over the full substation lifecycle rather than evaluated only through the initial hardware purchase price.

Regional Insights

Asia Pacific is assessed as the largest unit-demand region, led by China’s extensive transmission and distribution system, active domestic supplier base and continuing deployment of intelligent and digital substations. Europe remains a standards-driven market with strong supplier concentration and demand for interoperable, modular and lifecycle-oriented equipment. North America represents a high-value modernization market, where reliability, cybersecurity, utility qualification and integration with existing protection practices have a major influence on purchasing decisions. Japan and South Korea are selective but technically advanced markets, while India is developing domestic capability alongside multinational supply. Southeast Asia, the Middle East and parts of Latin America offer project-based growth as transmission networks expand, although imported equipment and international engineering standards continue to play a large role. Regional market development will remain uneven because utility specifications, approval procedures and digital-substation investment cycles differ

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significantly.

Competitive Landscape Analysis

The market combines large multinational power-automation groups, specialized process-bus equipment suppliers and established Chinese protection and substation-automation manufacturers. Global groups such as ABB, Siemens, Hitachi Energy, GE Vernova, Schneider Electric and SEL compete through installed utility relationships, broad protection portfolios, engineering platforms, international certification and lifecycle support. European specialists including Arteche, Ingeteam, Efacec and Grid to Great emphasize dedicated merging-unit expertise, sensor integration or flexible digital-substation architectures. Toshiba and Hyosung Heavy Industries provide additional strength in Asian transmission and switchgear projects. Chinese suppliers including NARI Technology, Beijing Sifang Automation, Guodian Nanjing Automation, Changyuan Technology Group, Sieyuan Electric, Nanjing Hezhi Electric Power Technology, Jiangsu Wiscom Technology and Zhuhai Unitech Power Technology benefit from domestic project experience, local engineering resources and competitive delivery capability. Competition is increasingly determined by interoperability, utility qualification, cybersecurity, hybrid-input support and integration with broader protection-control ecosystems rather than hardware price alone. No single publicly verifiable dataset supports a precise global ranking or market-share allocation across these suppliers.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Digital Substation Merging Unit Industry Forecast” looks at past sales and reviews total world Digital Substation Merging Unit sales in 2025, providing a comprehensive analysis by region and market sector of projected Digital Substation Merging Unit sales for 2026 through 2032. With Digital Substation Merging Unit sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Digital Substation Merging Unit industry.

This Insight Report provides a comprehensive analysis of the global Digital Substation Merging Unit landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Digital Substation Merging Unit portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Digital Substation Merging Unit market.

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This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Digital Substation Merging Unit and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Digital Substation Merging Unit.

This report presents a comprehensive overview, market shares, and growth opportunities of Digital Substation Merging Unit market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Dedicated Stand-Alone Merging Unit

Integrated Process Interface Unit

Other

Segmentation by Sampled Value Output Standard:

IEC 61850-9-2 LE Product

IEC 61869-9 Product

Dual-Profile Product

Other

Segmentation by Application:

Distribution Feeder Bay

Transmission Line Bay

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Power Transformer Bay

Busbar Voltage Bay

Revenue Metering Bay

Power Quality Monitoring Bay

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

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Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

ABB Ltd.

Siemens AG

Hitachi Energy Ltd.

GE Vernova Inc.

Schneider Electric SE

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Schweitzer Engineering Laboratories Inc.

Arteche Lantegi Elkartea S.A.

Ingeteam Power Technology S.A.

Efacec Energia M?quinas e Equipamentos El?ctricos S.A.

Toshiba Corporation

Hyosung Heavy Industries Co. Ltd.

Grid to Great B.V.

NARI Technology Co. Ltd.

Beijing Sifang Automation Co. Ltd.

Guodian Nanjing Automation Co. Ltd.

Changyuan Technology Group Ltd.

Sieyuan Electric Co. Ltd.

Nanjing Hezhi Electric Power Technology Co. Ltd.

Jiangsu Wiscom Technology Co. Ltd.

Zhuhai Unitech Power Technology Co. Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Digital Substation Merging Unit market?

What factors are driving Digital Substation Merging Unit market growth, globally and by region?

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Which technologies are poised for the fastest growth by market and region?

How do Digital Substation Merging Unit market opportunities vary by end market size?

How does Digital Substation Merging Unit break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Digital Substation Merging Unit Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Digital Substation Merging Unit by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Digital Substation Merging Unit by Country/Region, 2021, 2025 & 2032
2.2 Digital Substation Merging Unit Segment by Type
  2.2.1 Dedicated Stand-Alone Merging Unit
  2.2.2 Integrated Process Interface Unit
  2.2.3 Other
  2.2.4 Digital Substation Merging Unit Sales by Type
    2.2.4.1 Global Digital Substation Merging Unit Sales Market Share by Type (2021-2026)
    2.2.4.2 Global Digital Substation Merging Unit Revenue and Market Share by Type (2021-2026)
    2.2.4.3 Global Digital Substation Merging Unit Sale Price by Type (2021-2026)
2.3 Digital Substation Merging Unit Segment by Sampled Value Output Standard
  2.3.1 IEC 61850-9-2 LE Product
  2.3.2 IEC 61869-9 Product
  2.3.3 Dual-Profile Product
  2.3.4 Other
  2.3.5 Digital Substation Merging Unit Sales by Sampled Value Output Standard
    2.3.5.1 Global Digital Substation Merging Unit Sales Market Share by Sampled Value Output Standard (2021-2026)

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2.3.5.2 Global Digital Substation Merging Unit Revenue and Market Share by Sampled Value Output Standard (2021-2026)
2.3.5.3 Global Digital Substation Merging Unit Sale Price by Sampled Value Output Standard (2021-2026)
2.4 Digital Substation Merging Unit Segment by Application
2.4.1 Distribution Feeder Bay
2.4.2 Transmission Line Bay
2.4.3 Power Transformer Bay
2.4.4 Busbar Voltage Bay
2.4.5 Revenue Metering Bay
2.4.6 Power Quality Monitoring Bay
2.4.7 Other
2.4.8 Digital Substation Merging Unit Sales by Application
2.4.8.1 Global Digital Substation Merging Unit Sale Market Share by Application (2021-2026)
2.4.8.2 Global Digital Substation Merging Unit Revenue and Market Share by Application (2021-2026)
2.4.8.3 Global Digital Substation Merging Unit Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Digital Substation Merging Unit Breakdown Data by Company
3.1.1 Global Digital Substation Merging Unit Annual Sales by Company (2021-2026)
3.1.2 Global Digital Substation Merging Unit Sales Market Share by Company (2021-2026)
3.2 Global Digital Substation Merging Unit Annual Revenue by Company (2021-2026)
3.2.1 Global Digital Substation Merging Unit Revenue by Company (2021-2026)
3.2.2 Global Digital Substation Merging Unit Revenue Market Share by Company (2021-2026)
3.3 Global Digital Substation Merging Unit Sale Price by Company
3.4 Key Manufacturers Digital Substation Merging Unit Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Digital Substation Merging Unit Product Location Distribution
3.4.2 Players Digital Substation Merging Unit Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

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info@marketpublishers.com

4 WORLD HISTORIC REVIEW FOR DIGITAL SUBSTATION MERGING UNIT BY GEOGRAPHIC REGION

4.1 World Historic Digital Substation Merging Unit Market Size by Geographic Region (2021-2026)
4.1.1 Global Digital Substation Merging Unit Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Digital Substation Merging Unit Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Digital Substation Merging Unit Market Size by Country/Region (2021-2026)
4.2.1 Global Digital Substation Merging Unit Annual Sales by Country/Region (2021-2026)
4.2.2 Global Digital Substation Merging Unit Annual Revenue by Country/Region (2021-2026)
4.3 Americas Digital Substation Merging Unit Sales Growth
4.4 APAC Digital Substation Merging Unit Sales Growth
4.5 Europe Digital Substation Merging Unit Sales Growth
4.6 Middle East & Africa Digital Substation Merging Unit Sales Growth

5 AMERICAS

5.1 Americas Digital Substation Merging Unit Sales by Country
5.1.1 Americas Digital Substation Merging Unit Sales by Country (2021-2026)
5.1.2 Americas Digital Substation Merging Unit Revenue by Country (2021-2026)
5.2 Americas Digital Substation Merging Unit Sales by Type (2021-2026)
5.3 Americas Digital Substation Merging Unit Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Digital Substation Merging Unit Sales by Region
6.1.1 APAC Digital Substation Merging Unit Sales by Region (2021-2026)
6.1.2 APAC Digital Substation Merging Unit Revenue by Region (2021-2026)
6.2 APAC Digital Substation Merging Unit Sales by Type (2021-2026)

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6.3 APAC Digital Substation Merging Unit Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Digital Substation Merging Unit by Country
  7.1.1 Europe Digital Substation Merging Unit Sales by Country (2021-2026)
  7.1.2 Europe Digital Substation Merging Unit Revenue by Country (2021-2026)
7.2 Europe Digital Substation Merging Unit Sales by Type (2021-2026)
7.3 Europe Digital Substation Merging Unit Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Digital Substation Merging Unit by Country
  8.1.1 Middle East & Africa Digital Substation Merging Unit Sales by Country (2021-2026)
  8.1.2 Middle East & Africa Digital Substation Merging Unit Revenue by Country (2021-2026)
8.2 Middle East & Africa Digital Substation Merging Unit Sales by Type (2021-2026)
8.3 Middle East & Africa Digital Substation Merging Unit Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

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info@marketpublishers.com

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Digital Substation Merging Unit
10.3 Manufacturing Process Analysis of Digital Substation Merging Unit
10.4 Industry Chain Structure of Digital Substation Merging Unit

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Digital Substation Merging Unit Distributors
11.3 Digital Substation Merging Unit Customer

12 WORLD FORECAST REVIEW FOR DIGITAL SUBSTATION MERGING UNIT BY GEOGRAPHIC REGION

12.1 Global Digital Substation Merging Unit Market Size Forecast by Region
  12.1.1 Global Digital Substation Merging Unit Forecast by Region (2027-2032)
  12.1.2 Global Digital Substation Merging Unit Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Digital Substation Merging Unit Forecast by Type (2027-2032)
12.7 Global Digital Substation Merging Unit Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 ABB Ltd.
  13.1.1 ABB Ltd. Company Information
  13.1.2 ABB Ltd. Digital Substation Merging Unit Product Portfolios and Specifications

+357 96 030922
info@marketpublishers.com

13.1.3 ABB Ltd. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 ABB Ltd. Main Business Overview
13.1.5 ABB Ltd. Latest Developments
13.2 Siemens AG
13.2.1 Siemens AG Company Information
13.2.2 Siemens AG Digital Substation Merging Unit Product Portfolios and Specifications
13.2.3 Siemens AG Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Siemens AG Main Business Overview
13.2.5 Siemens AG Latest Developments
13.3 Hitachi Energy Ltd.
13.3.1 Hitachi Energy Ltd. Company Information
13.3.2 Hitachi Energy Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
13.3.3 Hitachi Energy Ltd. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Hitachi Energy Ltd. Main Business Overview
13.3.5 Hitachi Energy Ltd. Latest Developments
13.4 GE Vernova Inc.
13.4.1 GE Vernova Inc. Company Information
13.4.2 GE Vernova Inc. Digital Substation Merging Unit Product Portfolios and Specifications
13.4.3 GE Vernova Inc. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 GE Vernova Inc. Main Business Overview
13.4.5 GE Vernova Inc. Latest Developments
13.5 Schneider Electric SE
13.5.1 Schneider Electric SE Company Information
13.5.2 Schneider Electric SE Digital Substation Merging Unit Product Portfolios and Specifications
13.5.3 Schneider Electric SE Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Schneider Electric SE Main Business Overview
13.5.5 Schneider Electric SE Latest Developments
13.6 Schweitzer Engineering Laboratories Inc.
13.6.1 Schweitzer Engineering Laboratories Inc. Company Information
13.6.2 Schweitzer Engineering Laboratories Inc. Digital Substation Merging Unit

+357 96 030922
info@marketpublishers.com

Product Portfolios and Specifications
13.6.3 Schweitzer Engineering Laboratories Inc. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Schweitzer Engineering Laboratories Inc. Main Business Overview
13.6.5 Schweitzer Engineering Laboratories Inc. Latest Developments
13.7 Arteche Lantegi Elkartea S.A.
13.7.1 Arteche Lantegi Elkartea S.A. Company Information
13.7.2 Arteche Lantegi Elkartea S.A. Digital Substation Merging Unit Product Portfolios and Specifications
13.7.3 Arteche Lantegi Elkartea S.A. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Arteche Lantegi Elkartea S.A. Main Business Overview
13.7.5 Arteche Lantegi Elkartea S.A. Latest Developments
13.8 Ingeteam Power Technology S.A.
13.8.1 Ingeteam Power Technology S.A. Company Information
13.8.2 Ingeteam Power Technology S.A. Digital Substation Merging Unit Product Portfolios and Specifications
13.8.3 Ingeteam Power Technology S.A. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Ingeteam Power Technology S.A. Main Business Overview
13.8.5 Ingeteam Power Technology S.A. Latest Developments
13.9 Efacec Energia M?quinas e Equipamentos El?ctricos S.A.
13.9.1 Efacec Energia M?quinas e Equipamentos El?ctricos S.A. Company Information
13.9.2 Efacec Energia M?quinas e Equipamentos El?ctricos S.A. Digital Substation Merging Unit Product Portfolios and Specifications
13.9.3 Efacec Energia M?quinas e Equipamentos El?ctricos S.A. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Efacec Energia M?quinas e Equipamentos El?ctricos S.A. Main Business Overview
13.9.5 Efacec Energia M?quinas e Equipamentos El?ctricos S.A. Latest Developments
13.10 Toshiba Corporation
13.10.1 Toshiba Corporation Company Information
13.10.2 Toshiba Corporation Digital Substation Merging Unit Product Portfolios and Specifications
13.10.3 Toshiba Corporation Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Toshiba Corporation Main Business Overview
13.10.5 Toshiba Corporation Latest Developments

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13.11 Hyosung Heavy Industries Co. Ltd.
13.11.1 Hyosung Heavy Industries Co. Ltd. Company Information
13.11.2 Hyosung Heavy Industries Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
13.11.3 Hyosung Heavy Industries Co. Ltd. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Hyosung Heavy Industries Co. Ltd. Main Business Overview
13.11.5 Hyosung Heavy Industries Co. Ltd. Latest Developments
13.12 Grid to Great B.V.
13.12.1 Grid to Great B.V. Company Information
13.12.2 Grid to Great B.V. Digital Substation Merging Unit Product Portfolios and Specifications
13.12.3 Grid to Great B.V. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Grid to Great B.V. Main Business Overview
13.12.5 Grid to Great B.V. Latest Developments
13.13 NARI Technology Co. Ltd.
13.13.1 NARI Technology Co. Ltd. Company Information
13.13.2 NARI Technology Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
13.13.3 NARI Technology Co. Ltd. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 NARI Technology Co. Ltd. Main Business Overview
13.13.5 NARI Technology Co. Ltd. Latest Developments
13.14 Beijing Sifang Automation Co. Ltd.
13.14.1 Beijing Sifang Automation Co. Ltd. Company Information
13.14.2 Beijing Sifang Automation Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
13.14.3 Beijing Sifang Automation Co. Ltd. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Beijing Sifang Automation Co. Ltd. Main Business Overview
13.14.5 Beijing Sifang Automation Co. Ltd. Latest Developments
13.15 Guodian Nanjing Automation Co. Ltd.
13.15.1 Guodian Nanjing Automation Co. Ltd. Company Information
13.15.2 Guodian Nanjing Automation Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
13.15.3 Guodian Nanjing Automation Co. Ltd. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Guodian Nanjing Automation Co. Ltd. Main Business Overview

+357 96 030922
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13.15.5 Guodian Nanjing Automation Co. Ltd. Latest Developments
13.16 Changyuan Technology Group Ltd.
13.16.1 Changyuan Technology Group Ltd. Company Information
13.16.2 Changyuan Technology Group Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
13.16.3 Changyuan Technology Group Ltd. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Changyuan Technology Group Ltd. Main Business Overview
13.16.5 Changyuan Technology Group Ltd. Latest Developments
13.17 Sieyuan Electric Co. Ltd.
13.17.1 Sieyuan Electric Co. Ltd. Company Information
13.17.2 Sieyuan Electric Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
13.17.3 Sieyuan Electric Co. Ltd. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Sieyuan Electric Co. Ltd. Main Business Overview
13.17.5 Sieyuan Electric Co. Ltd. Latest Developments
13.18 Nanjing Hezhi Electric Power Technology Co. Ltd.
13.18.1 Nanjing Hezhi Electric Power Technology Co. Ltd. Company Information
13.18.2 Nanjing Hezhi Electric Power Technology Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
13.18.3 Nanjing Hezhi Electric Power Technology Co. Ltd. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Nanjing Hezhi Electric Power Technology Co. Ltd. Main Business Overview
13.18.5 Nanjing Hezhi Electric Power Technology Co. Ltd. Latest Developments
13.19 Jiangsu Wiscom Technology Co. Ltd.
13.19.1 Jiangsu Wiscom Technology Co. Ltd. Company Information
13.19.2 Jiangsu Wiscom Technology Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
13.19.3 Jiangsu Wiscom Technology Co. Ltd. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Jiangsu Wiscom Technology Co. Ltd. Main Business Overview
13.19.5 Jiangsu Wiscom Technology Co. Ltd. Latest Developments
13.20 Zhuhai Unitech Power Technology Co. Ltd.
13.20.1 Zhuhai Unitech Power Technology Co. Ltd. Company Information
13.20.2 Zhuhai Unitech Power Technology Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
13.20.3 Zhuhai Unitech Power Technology Co. Ltd. Digital Substation Merging Unit Sales, Revenue, Price and Gross Margin (2021-2026)

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13.20.4 Zhuhai Unitech Power Technology Co. Ltd. Main Business Overview
13.20.5 Zhuhai Unitech Power Technology Co. Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Digital Substation Merging Unit Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Digital Substation Merging Unit Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Dedicated Stand-Alone Merging Unit
Table 4. Major Players of Integrated Process Interface Unit
Table 5. Major Players of Other
Table 6. Global Digital Substation Merging Unit Sales by Type (2021-2026) & (Units)
Table 7. Global Digital Substation Merging Unit Sales Market Share by Type (2021-2026)
Table 8. Global Digital Substation Merging Unit Revenue by Type (2021-2026) & ($ million)
Table 9. Global Digital Substation Merging Unit Revenue Market Share by Type (2021-2026)
Table 10. Global Digital Substation Merging Unit Sale Price by Type (2021-2026) & (US$/Unit)
Table 11. Major Players of IEC 61850-9-2 LE Product
Table 12. Major Players of IEC 61869-9 Product
Table 13. Major Players of Dual-Profile Product
Table 14. Major Players of Other
Table 15. Global Digital Substation Merging Unit Sales by Sampled Value Output Standard (2021-2026) & (Units)
Table 16. Global Digital Substation Merging Unit Sales Market Share by Sampled Value Output Standard (2021-2026)
Table 17. Global Digital Substation Merging Unit Revenue by Sampled Value Output Standard (2021-2026) & ($ million)
Table 18. Global Digital Substation Merging Unit Revenue Market Share by Sampled Value Output Standard (2021-2026)
Table 19. Global Digital Substation Merging Unit Sale Price by Sampled Value Output Standard (2021-2026) & (US$/Unit)
Table 20. Global Digital Substation Merging Unit Sale by Application (2021-2026) & (Units)
Table 21. Global Digital Substation Merging Unit Sale Market Share by Application (2021-2026)
Table 22. Global Digital Substation Merging Unit Revenue by Application (2021-2026) &

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($ million)
Table 23. Global Digital Substation Merging Unit Revenue Market Share by Application (2021-2026)
Table 24. Global Digital Substation Merging Unit Sale Price by Application (2021-2026) & (US$/Unit)
Table 25. Global Digital Substation Merging Unit Sales by Company (2021-2026) & (Units)
Table 26. Global Digital Substation Merging Unit Sales Market Share by Company (2021-2026)
Table 27. Global Digital Substation Merging Unit Revenue by Company (2021-2026) & ($ millions)
Table 28. Global Digital Substation Merging Unit Revenue Market Share by Company (2021-2026)
Table 29. Global Digital Substation Merging Unit Sale Price by Company (2021-2026) & (US$/Unit)
Table 30. Key Manufacturers Digital Substation Merging Unit Producing Area Distribution and Sales Area
Table 31. Players Digital Substation Merging Unit Products Offered
Table 32. Digital Substation Merging Unit Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 33. New Products and Potential Entrants
Table 34. Market M&A Activity & Strategy
Table 35. Global Digital Substation Merging Unit Sales by Geographic Region (2021-2026) & (Units)
Table 36. Global Digital Substation Merging Unit Sales Market Share Geographic Region (2021-2026)
Table 37. Global Digital Substation Merging Unit Revenue by Geographic Region (2021-2026) & ($ millions)
Table 38. Global Digital Substation Merging Unit Revenue Market Share by Geographic Region (2021-2026)
Table 39. Global Digital Substation Merging Unit Sales by Country/Region (2021-2026) & (Units)
Table 40. Global Digital Substation Merging Unit Sales Market Share by Country/Region (2021-2026)
Table 41. Global Digital Substation Merging Unit Revenue by Country/Region (2021-2026) & ($ millions)
Table 42. Global Digital Substation Merging Unit Revenue Market Share by Country/Region (2021-2026)
Table 43. Americas Digital Substation Merging Unit Sales by Country (2021-2026) &

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(Units)
Table 44. Americas Digital Substation Merging Unit Sales Market Share by Country (2021-2026)
Table 45. Americas Digital Substation Merging Unit Revenue by Country (2021-2026) & ($ millions)
Table 46. Americas Digital Substation Merging Unit Sales by Type (2021-2026) & (Units)
Table 47. Americas Digital Substation Merging Unit Sales by Application (2021-2026) & (Units)
Table 48. APAC Digital Substation Merging Unit Sales by Region (2021-2026) & (Units)
Table 49. APAC Digital Substation Merging Unit Sales Market Share by Region (2021-2026)
Table 50. APAC Digital Substation Merging Unit Revenue by Region (2021-2026) & ($ millions)
Table 51. APAC Digital Substation Merging Unit Sales by Type (2021-2026) & (Units)
Table 52. APAC Digital Substation Merging Unit Sales by Application (2021-2026) & (Units)
Table 53. Europe Digital Substation Merging Unit Sales by Country (2021-2026) & (Units)
Table 54. Europe Digital Substation Merging Unit Revenue by Country (2021-2026) & ($ millions)
Table 55. Europe Digital Substation Merging Unit Sales by Type (2021-2026) & (Units)
Table 56. Europe Digital Substation Merging Unit Sales by Application (2021-2026) & (Units)
Table 57. Middle East & Africa Digital Substation Merging Unit Sales by Country (2021-2026) & (Units)
Table 58. Middle East & Africa Digital Substation Merging Unit Revenue Market Share by Country (2021-2026)
Table 59. Middle East & Africa Digital Substation Merging Unit Sales by Type (2021-2026) & (Units)
Table 60. Middle East & Africa Digital Substation Merging Unit Sales by Application (2021-2026) & (Units)
Table 61. Key Market Drivers & Growth Opportunities of Digital Substation Merging Unit
Table 62. Key Market Challenges & Risks of Digital Substation Merging Unit
Table 63. Key Industry Trends of Digital Substation Merging Unit
Table 64. Digital Substation Merging Unit Raw Material
Table 65. Key Suppliers of Raw Materials
Table 66. Digital Substation Merging Unit Distributors List
Table 67. Digital Substation Merging Unit Customer List

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Table 68. Global Digital Substation Merging Unit Sales Forecast by Region (2027-2032) & (Units)
Table 69. Global Digital Substation Merging Unit Revenue Forecast by Region (2027-2032) & ($ millions)
Table 70. Americas Digital Substation Merging Unit Sales Forecast by Country (2027-2032) & (Units)
Table 71. Americas Digital Substation Merging Unit Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 72. APAC Digital Substation Merging Unit Sales Forecast by Region (2027-2032) & (Units)
Table 73. APAC Digital Substation Merging Unit Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 74. Europe Digital Substation Merging Unit Sales Forecast by Country (2027-2032) & (Units)
Table 75. Europe Digital Substation Merging Unit Revenue Forecast by Country (2027-2032) & ($ millions)
Table 76. Middle East & Africa Digital Substation Merging Unit Sales Forecast by Country (2027-2032) & (Units)
Table 77. Middle East & Africa Digital Substation Merging Unit Revenue Forecast by Country (2027-2032) & ($ millions)
Table 78. Global Digital Substation Merging Unit Sales Forecast by Type (2027-2032) & (Units)
Table 79. Global Digital Substation Merging Unit Revenue Forecast by Type (2027-2032) & ($ millions)
Table 80. Global Digital Substation Merging Unit Sales Forecast by Application (2027-2032) & (Units)
Table 81. Global Digital Substation Merging Unit Revenue Forecast by Application (2027-2032) & ($ millions)
Table 82. ABB Ltd. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 83. ABB Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
Table 84. ABB Ltd. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 85. ABB Ltd. Main Business
Table 86. ABB Ltd. Latest Developments
Table 87. Siemens AG Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 88. Siemens AG Digital Substation Merging Unit Product Portfolios and Specifications

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Table 89. Siemens AG Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 90. Siemens AG Main Business
Table 91. Siemens AG Latest Developments
Table 92. Hitachi Energy Ltd. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 93. Hitachi Energy Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
Table 94. Hitachi Energy Ltd. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 95. Hitachi Energy Ltd. Main Business
Table 96. Hitachi Energy Ltd. Latest Developments
Table 97. GE Vernova Inc. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 98. GE Vernova Inc. Digital Substation Merging Unit Product Portfolios and Specifications
Table 99. GE Vernova Inc. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 100. GE Vernova Inc. Main Business
Table 101. GE Vernova Inc. Latest Developments
Table 102. Schneider Electric SE Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 103. Schneider Electric SE Digital Substation Merging Unit Product Portfolios and Specifications
Table 104. Schneider Electric SE Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 105. Schneider Electric SE Main Business
Table 106. Schneider Electric SE Latest Developments
Table 107. Schweitzer Engineering Laboratories Inc. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 108. Schweitzer Engineering Laboratories Inc. Digital Substation Merging Unit Product Portfolios and Specifications
Table 109. Schweitzer Engineering Laboratories Inc. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 110. Schweitzer Engineering Laboratories Inc. Main Business
Table 111. Schweitzer Engineering Laboratories Inc. Latest Developments
Table 112. Arteche Lantegi Elkartea S.A. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 113. Arteche Lantegi Elkartea S.A. Digital Substation Merging Unit Product

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Portfolios and Specifications
Table 114. Arteche Lantegi Elkartea S.A. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 115. Arteche Lantegi Elkartea S.A. Main Business
Table 116. Arteche Lantegi Elkartea S.A. Latest Developments
Table 117. Ingeteam Power Technology S.A. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 118. Ingeteam Power Technology S.A. Digital Substation Merging Unit Product Portfolios and Specifications
Table 119. Ingeteam Power Technology S.A. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 120. Ingeteam Power Technology S.A. Main Business
Table 121. Ingeteam Power Technology S.A. Latest Developments
Table 122. Efacec Energia M?quinas e Equipamentos El?ctricos S.A. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 123. Efacec Energia M?quinas e Equipamentos El?ctricos S.A. Digital Substation Merging Unit Product Portfolios and Specifications
Table 124. Efacec Energia M?quinas e Equipamentos El?ctricos S.A. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 125. Efacec Energia M?quinas e Equipamentos El?ctricos S.A. Main Business
Table 126. Efacec Energia M?quinas e Equipamentos El?ctricos S.A. Latest Developments
Table 127. Toshiba Corporation Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 128. Toshiba Corporation Digital Substation Merging Unit Product Portfolios and Specifications
Table 129. Toshiba Corporation Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 130. Toshiba Corporation Main Business
Table 131. Toshiba Corporation Latest Developments
Table 132. Hyosung Heavy Industries Co. Ltd. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 133. Hyosung Heavy Industries Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
Table 134. Hyosung Heavy Industries Co. Ltd. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 135. Hyosung Heavy Industries Co. Ltd. Main Business
Table 136. Hyosung Heavy Industries Co. Ltd. Latest Developments

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Table 137. Grid to Great B.V. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 138. Grid to Great B.V. Digital Substation Merging Unit Product Portfolios and Specifications
Table 139. Grid to Great B.V. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 140. Grid to Great B.V. Main Business
Table 141. Grid to Great B.V. Latest Developments
Table 142. NARI Technology Co. Ltd. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 143. NARI Technology Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
Table 144. NARI Technology Co. Ltd. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 145. NARI Technology Co. Ltd. Main Business
Table 146. NARI Technology Co. Ltd. Latest Developments
Table 147. Beijing Sifang Automation Co. Ltd. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 148. Beijing Sifang Automation Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
Table 149. Beijing Sifang Automation Co. Ltd. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 150. Beijing Sifang Automation Co. Ltd. Main Business
Table 151. Beijing Sifang Automation Co. Ltd. Latest Developments
Table 152. Guodian Nanjing Automation Co. Ltd. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 153. Guodian Nanjing Automation Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
Table 154. Guodian Nanjing Automation Co. Ltd. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 155. Guodian Nanjing Automation Co. Ltd. Main Business
Table 156. Guodian Nanjing Automation Co. Ltd. Latest Developments
Table 157. Changyuan Technology Group Ltd. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 158. Changyuan Technology Group Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
Table 159. Changyuan Technology Group Ltd. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 160. Changyuan Technology Group Ltd. Main Business

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Table 161. Changyuan Technology Group Ltd. Latest Developments
Table 162. Sieyuan Electric Co. Ltd. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 163. Sieyuan Electric Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
Table 164. Sieyuan Electric Co. Ltd. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 165. Sieyuan Electric Co. Ltd. Main Business
Table 166. Sieyuan Electric Co. Ltd. Latest Developments
Table 167. Nanjing Hezhi Electric Power Technology Co. Ltd. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 168. Nanjing Hezhi Electric Power Technology Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
Table 169. Nanjing Hezhi Electric Power Technology Co. Ltd. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 170. Nanjing Hezhi Electric Power Technology Co. Ltd. Main Business
Table 171. Nanjing Hezhi Electric Power Technology Co. Ltd. Latest Developments
Table 172. Jiangsu Wiscom Technology Co. Ltd. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 173. Jiangsu Wiscom Technology Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
Table 174. Jiangsu Wiscom Technology Co. Ltd. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 175. Jiangsu Wiscom Technology Co. Ltd. Main Business
Table 176. Jiangsu Wiscom Technology Co. Ltd. Latest Developments
Table 177. Zhuhai Unitech Power Technology Co. Ltd. Basic Information, Digital Substation Merging Unit Manufacturing Base, Sales Area and Its Competitors
Table 178. Zhuhai Unitech Power Technology Co. Ltd. Digital Substation Merging Unit Product Portfolios and Specifications
Table 179. Zhuhai Unitech Power Technology Co. Ltd. Digital Substation Merging Unit Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 180. Zhuhai Unitech Power Technology Co. Ltd. Main Business
Table 181. Zhuhai Unitech Power Technology Co. Ltd. Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Digital Substation Merging Unit
Figure 2. Digital Substation Merging Unit Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Digital Substation Merging Unit Sales Growth Rate 2021-2032 (Units)
Figure 7. Global Digital Substation Merging Unit Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Digital Substation Merging Unit Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Digital Substation Merging Unit Sales Market Share by Country/Region (2025)
Figure 10. Digital Substation Merging Unit Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Dedicated Stand-Alone Merging Unit
Figure 12. Product Picture of Integrated Process Interface Unit
Figure 13. Product Picture of Other
Figure 14. Global Digital Substation Merging Unit Sales Market Share by Type in 2026
Figure 15. Global Digital Substation Merging Unit Revenue Market Share by Type (2021-2026)
Figure 16. Product Picture of IEC 61850-9-2 LE Product
Figure 17. Product Picture of IEC 61869-9 Product
Figure 18. Product Picture of Dual-Profile Product
Figure 19. Product Picture of Other
Figure 20. Global Digital Substation Merging Unit Sales Market Share by Sampled Value Output Standard in 2026
Figure 21. Global Digital Substation Merging Unit Revenue Market Share by Sampled Value Output Standard (2021-2026)
Figure 22. Digital Substation Merging Unit Consumed in Distribution Feeder Bay
Figure 23. Global Digital Substation Merging Unit Market: Distribution Feeder Bay (2021-2026) & (Units)
Figure 24. Digital Substation Merging Unit Consumed in Transmission Line Bay
Figure 25. Global Digital Substation Merging Unit Market: Transmission Line Bay (2021-2026) & (Units)
Figure 26. Digital Substation Merging Unit Consumed in Power Transformer Bay
Figure 27. Global Digital Substation Merging Unit Market: Power Transformer Bay

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(2021-2026) & (Units)
Figure 28. Digital Substation Merging Unit Consumed in Busbar Voltage Bay
Figure 29. Global Digital Substation Merging Unit Market: Busbar Voltage Bay (2021-2026) & (Units)
Figure 30. Digital Substation Merging Unit Consumed in Revenue Metering Bay
Figure 31. Global Digital Substation Merging Unit Market: Revenue Metering Bay (2021-2026) & (Units)
Figure 32. Digital Substation Merging Unit Consumed in Power Quality Monitoring Bay
Figure 33. Global Digital Substation Merging Unit Market: Power Quality Monitoring Bay (2021-2026) & (Units)
Figure 34. Digital Substation Merging Unit Consumed in Other
Figure 35. Global Digital Substation Merging Unit Market: Other (2021-2026) & (Units)
Figure 36. Global Digital Substation Merging Unit Sale Market Share by Application (2025)
Figure 37. Global Digital Substation Merging Unit Revenue Market Share by Application in 2025
Figure 38. Digital Substation Merging Unit Sales by Company in 2025 (Units)
Figure 39. Global Digital Substation Merging Unit Sales Market Share by Company in 2025
Figure 40. Digital Substation Merging Unit Revenue by Company in 2025 ($ millions)
Figure 41. Global Digital Substation Merging Unit Revenue Market Share by Company in 2025
Figure 42. Global Digital Substation Merging Unit Sales Market Share by Geographic Region (2021-2026)
Figure 43. Global Digital Substation Merging Unit Revenue Market Share by Geographic Region in 2025
Figure 44. Americas Digital Substation Merging Unit Sales 2021-2026 (Units)
Figure 45. Americas Digital Substation Merging Unit Revenue 2021-2026 ($ millions)
Figure 46. APAC Digital Substation Merging Unit Sales 2021-2026 (Units)
Figure 47. APAC Digital Substation Merging Unit Revenue 2021-2026 ($ millions)
Figure 48. Europe Digital Substation Merging Unit Sales 2021-2026 (Units)
Figure 49. Europe Digital Substation Merging Unit Revenue 2021-2026 ($ millions)
Figure 50. Middle East & Africa Digital Substation Merging Unit Sales 2021-2026 (Units)
Figure 51. Middle East & Africa Digital Substation Merging Unit Revenue 2021-2026 ($ millions)
Figure 52. Americas Digital Substation Merging Unit Sales Market Share by Country in 2025
Figure 53. Americas Digital Substation Merging Unit Revenue Market Share by Country (2021-2026)

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Figure 54. Americas Digital Substation Merging Unit Sales Market Share by Type (2021-2026)
Figure 55. Americas Digital Substation Merging Unit Sales Market Share by Application (2021-2026)
Figure 56. United States Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 57. Canada Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 58. Mexico Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 59. Brazil Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 60. APAC Digital Substation Merging Unit Sales Market Share by Region in 2025
Figure 61. APAC Digital Substation Merging Unit Revenue Market Share by Region (2021-2026)
Figure 62. APAC Digital Substation Merging Unit Sales Market Share by Type (2021-2026)
Figure 63. APAC Digital Substation Merging Unit Sales Market Share by Application (2021-2026)
Figure 64. China Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 65. Japan Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 66. South Korea Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 67. Southeast Asia Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 68. India Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 69. Australia Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 70. China Taiwan Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 71. Europe Digital Substation Merging Unit Sales Market Share by Country in 2025
Figure 72. Europe Digital Substation Merging Unit Revenue Market Share by Country (2021-2026)
Figure 73. Europe Digital Substation Merging Unit Sales Market Share by Type (2021-2026)
Figure 74. Europe Digital Substation Merging Unit Sales Market Share by Application

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(2021-2026)
Figure 75. Germany Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 76. France Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 77. UK Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 78. Italy Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 79. Russia Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 80. Middle East & Africa Digital Substation Merging Unit Sales Market Share by Country (2021-2026)
Figure 81. Middle East & Africa Digital Substation Merging Unit Sales Market Share by Type (2021-2026)
Figure 82. Middle East & Africa Digital Substation Merging Unit Sales Market Share by Application (2021-2026)
Figure 83. Egypt Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 84. South Africa Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 85. Israel Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 86. Turkey Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 87. GCC Countries Digital Substation Merging Unit Revenue Growth 2021-2026 ($ millions)
Figure 88. Manufacturing Cost Structure Analysis of Digital Substation Merging Unit in 2026
Figure 89. Manufacturing Process Analysis of Digital Substation Merging Unit
Figure 90. Industry Chain Structure of Digital Substation Merging Unit
Figure 91. Channels of Distribution
Figure 92. Global Digital Substation Merging Unit Sales Market Forecast by Region (2027-2032)
Figure 93. Global Digital Substation Merging Unit Revenue Market Share Forecast by Region (2027-2032)
Figure 94. Global Digital Substation Merging Unit Sales Market Share Forecast by Type (2027-2032)
Figure 95. Global Digital Substation Merging Unit Revenue Market Share Forecast by Type (2027-2032)
Figure 96. Global Digital Substation Merging Unit Sales Market Share Forecast by

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Application (2027-2032)

Figure 97. Global Digital Substation Merging Unit Revenue Market Share Forecast by Application (2027-2032)

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