

Advanced Metering Infrastructure Market by Devices (Smart Meters, Communication Modules), Solutions (Meter Data Management & Analytics, AMI Security, Meter Communication Infrastructure), Services, by Regions - Global Forecast to 2020

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Abstracts

“Increasing global energy demand, government mandates and compliances related to energy conservations are expected to drive the AMI market”

The AMI market size is estimated to grow from USD 10.06 billion in 2015 to USD 19.52 billion by 2020, at a Compound Annual Growth Rate (CAGR) of 14.2%. There is a persistent rise in global energy usage as Energy Information Administration (EIA) projects that global energy consumption will increase to 56% by 2040. Rapid industrialization in emerging economies such India and China have compelled the energy demand to accelerate in these regions. Also, turmoil in the Middle-East, political conflicts and overconsumption of energy are some of the reasons that act as a catalyst to the rising energy demand. Moreover, rising demand for energy has compelled utilities to upgrade the electric and distribution network, thereby, driving the adoption of AMI systems.

“Meter Communication Infrastructure (MCI) solution is expected to gain maximum traction during the forecast period”

In 2015, MCI solution accounts the highest market share in AMI market, by solution during the forecast period. Moreover, the penetration rate for MDM solution is also gaining traction which is the central point of integration for AMI system with in the utility companies. Whereas, meter deployment services are expected to grow at the highest CAGR from 2015 to 2020. However, system integration services are expected to hold

the highest market share during the forecast period.

In the process of determining and verifying the market size for several segments and sub-segments gathered through secondary research, extensive primary interviews were conducted with key industry personnel. The break-up of profile of primary discussion participants is given below.

By Company Type: Tier-1 (20%), Tier-2 (40%), and Tier-3 (40%) companies

By Designation: C-level (70%), Director Level (20%), and other executive level (10%)

By Region: North America (60%), Europe (30%), and Asia-Pacific (APAC) (10%)

The major trends in the smart meter segment include smart devices, Internet of Things (IoT), meter data analytics, and AMI security. The availability of cloud deployment options for AMI has further boosted the demand for AMI solutions across the utility sector. Therefore, AMI security and meter data analytics are the upcoming focus for the AMI market.

The various key AMI vendors profiled in the report are as follows:

1. Aclara Technologies LLC
2. CISCO Systems Inc.
3. Elster Group SE
4. General Electric
5. IBM Corporation
6. Itron Inc.
7. Schneider Electric SE
8. Sensus
9. Trilliant Inc.
10. Teito Corporation

The report will help the market leaders/new entrants in this market in the following ways:

1. This report segments the AMI market comprehensively and provides the closest approximations of the revenue numbers for the overall market and the sub segments across different verticals and regions.

2. The report helps the stakeholders understand the pulse of the market and provides them information on key market drivers, restraints, challenges, and opportunities.
3. This report will help the stakeholders to better understand the competitors and gain more insights to better their position in the business. The competitive landscape section includes competitor ecosystem, new product developments, partnerships, mergers, and acquisitions.

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About

AMI is one of the primary steps for smart grid optimization. To understand the customer needs and to fulfil them in an effective manner, involvement of both consumer and utility companies is essential which has led to the implementation of AMI. Different federal and state governments are implementing AMI systems which not only reduce cost but also provide other benefits at customer and operational level – such as more effective theft intrusion and detection, personalized tariff plans, improved service quality, and easy bill options. Integration of AMI technologies into existing system is growing rapidly; still there are some challenges that hinder the implementation of AMI such as standardization, regulatory control, and technological barriers.

AMI integrates smart meters, Meter Communication Infrastructure (MCI) and Meter Data Management (MDM) to provide seamless energy solutions to consumers. The AMI market research report analyzes the adoption trends region wise, future growth potential, key drivers, restraints, opportunities, and best practices in this market.

The AMI research study is a result of thorough secondary and primary research followed by market forecast using various data triangulation methods and proprietary market estimation models.

Secondary sources such as directories, blogs, whitepapers, articles, and databases such as Factiva and Hoovers were used to identify and collect technical and commercial information for this extensive study of the AMI market.

Key vendors in the AMI ecosystem were identified and studied individually to understand their product offerings, business and pricing models, and customer segments. This data was further scrutinized based on individual revenues, contributions from various regions, and business segments.

The primary research for this study comprised discussions with subject-matter experts and senior executives of various AMI solution providers. These discussions helped to understand market dynamics, and to obtain and verify critical information and market trends. The surveys and interviews were not only confined to the leading market players, but also included the start-ups and prominent regional players; this helped to understand the regional focus and adoption trends of AMI solutions and services. Respondents were led through a discussion guide to gather qualitative and quantitative inputs on their operations, strategies, revenues, and key developments in the market.

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