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Demand Response Management System Market by Types (Commercial, Industrial, Residential), Services (Curtailment, System Integration, Professional), Verticals (Manufacturing, Agriculture, Commercial Buildings), Regions - Global Forecast to 2020

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Abstracts

The global demand for smart grid technologies and demand response technologies is on an exponential rise due to rapid globalization and industrial growth. The per capita income and energy need is rising at a brisk pace in the developed economies. DRMS attains prime importance in such scenario, as it is a proven technology platform and a peak load management tool which helps in reducing the imbalance between energy supply and demand. The two types of demand response (DR) programs are price-based and incentives-based programs.

Most of the technologies have undertaken R&D and joint product development activities to launch new smart grid and demand response technologies to meet the increasing global demand of electricity. The major concern with companies these days is the absence of a single market model and lack of regulatory mandates in the European region. This has also resulted in the slow adoption of DR technology. However, the scenario is fast changing with the emergence of automated DR and increasing roll outs of smart grids.

The deployment of advanced demand response and smart grid technologies and solutions such as residential DRMS, industrial DRMS, and commercial DRMS enables the companies to reduce the demand supply imbalance of electricity significantly. Various other factors such as energy price volatility, customer switching, and cloud-based DRMS are catalyzing the overall growth of the DRMS market globally.

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MarketsandMarkets extensively divides the DRMS market by solution, service, vertical and region. DRMS solutions include commercial, industrial, and residential DRMS. Services include curtailment services, system integration and consulting services, managed services, and support and maintenance services. Verticals consists of manufacturing; office and commercial buildings; municipal, university, school and hospital systems (MUSH); energy & power; and agriculture. In addition, the report also classifies the market according to the regions of North America, Europe, Asia-Pacific (APAC), Middle-East and Africa (MEA), and Latin America.

ABB, EnerNOC, General Electric, Schneider Electric, and Siemens are some of the prominent players providing reliable DRMS solutions and services. MarketsandMarkets forecasts the global DRMS market to grow from USD 8.06 billion in 2015 to USD 31.69 billion by 2020, at a Compound Annual Growth Rate (CAGR) of 31.5% during the forecast period. Over the next 5 years, this market is expected to experience high traction in the APAC and MEA regions.

There are various assumptions that we have taken into consideration for market size and forecasting exercise. Few of global assumptions include political, economic, social, and technological factors. For instance, the exchange rate, one of the economic factors is expected to have a moderate rating of impact on this market.

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About

Energy markets across the globe are evolving with major smart grid initiatives for meeting long-term goals of creating a secure energy system where generation meets demand. Mass roll-outs of electric smart meters have enabled time-based electricity pricing options which are a major driver for active involvement of end-consumers in DR programs.

Energy-intensive C&I consumers have been a major contributor toward the overall market for DR. DR in the residential segment is largely undermined by DR providers but has significant scope of growth which is now corroborated with increasing mass deployments of smart meters and increasing shipments of energy management devices which can also be used for interfacing with DR platforms. Utilities need to come up with easier to comprehend DR programs for residential users. With the intertwined DR technologies and home energy management devices, consumers will be able to monitor and adjust their energy consumption more effectively. MarketsandMarkets expects an increasing uptake of the DRMS software solutions such as automated DR, by the end of the forecast period.

DR technology has been around for a while now but except for the U.S., the global adoption rate of DR programs has been slow. Absence of a single market model and lack of regulatory mandates in the European region have been the major factors for the slow growth of the DR market in this region. Many countries in the APAC region have a strong business case for implementing DR resources and the market in this region is expected to experience significant growth opportunities.

Overall Market Size

The global DRMS market is estimated by adding vendor revenues for DR software solutions and services. MarketsandMarkets forecasts the global DRMS market to grow from $XX billion in 2014 to $XX billion in 2019. This represents a Compound Annual Growth Rate (CAGR) of XX% from 2014 to 2019.

DR refers to an end-user, or retail utility customer, dropping, shifting, or self-generating electricity in response to a DR event or in response to high electricity prices. Various types of DR programs (price-based/incentive-based) are listed below:

Price-based options:

Time-of-Use (TOU) Rates: Rates with fixed price blocks that differ by time of day

Critical Peak Pricing: Rates that include a prespecified extra high rate that is triggered by the utility and is in effect for a limited number of hours

Real-Time Pricing: Rates that differ at some regular intervals in response to wholesale energy market prices

Incentive-based options:

Direct Load Control: Customers are provided with incentive payments for allowing the utility control over equipments such as Heating Ventilation & AC (HVAC)

Demand Bidding: Customers offer bids to curtail load when wholesale prices are high

Emergency: Customers receive payments for load reductions when needed

Capacity Market Programs: Customers receive payments for providing load reductions as substitutes for system capacity

Curtailable/Interruptible: Customers receive a discounted rate for reducing load upon request

Utilities and market operators engage DR service providers on a capacity-based agreement to provide them with an assured level of load reduction.

The various DRMS solutions available in the market are segmented in this section as C&I, residential DRMS, and Automated DR (ADR).

The DRMS solutions market is expected to grow from $XX billion in 2014 to $XX billion in 2019, at a CAGR of XX%.

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