

Energy Management Systems Market by Component, Type (Home Energy Management Systems, Building Energy Management Systems, Industrial Energy Management Systems), Deployment, End-User Industry and Region - Global Forecast to 2028

<https://marketpublishers.com/r/E5279C827C8EN.html>

Date: June 2023

Pages: 262

Price: US\$ 4,950.00 (Single User License)

ID: E5279C827C8EN

Abstracts

The global energy management systems market is estimated to grow from USD 75.6 billion by 2028 from an estimated of USD 40.7 billion in 2023; it is expected to record a CAGR of 13.2% during the forecast period. Increasing energy consumption is driving the demand of energy management systems market.

“Software: The fastest- growing segment of the Energy management systems market”

Based on by application of Energy management systems the industrial type segment is estimated to be the fastest-growing market from 2023 to 2028. Energy management is a need of any organization in any industry; therefore, specifically cloud-based energy management software has become the dominant tool. Cloud computing enables service providers to access an elastic pool of IT resources such as storage, servers, and computation, allowing them to scale computing capabilities up and down as client demands expand and change. Heating, ventilation, and air conditioning (HVAC); lighting, energy, and security are all automated in smart buildings. Sensor data, such as indoor and outdoor temperature and humidity, carbon dioxide concentration, and occupancy status, are required for automation. Smart buildings use data through a variety of ways to improve their energy efficiency.

“IEMS: The largest segment by type in Energy management systems market”

The IEMS segment, by type, is projected to hold the largest market size during the

forecast period. With the rise of Industry 4.0 within manufacturing environments, sensors, and cloud analytics can move towards smart energy management that includes not only heating and cooling of all spaces, such as warehouses and production floors, but also pumps, power plants, industrial equipment, and even vehicles and lighting. Many industrial sectors are among the hardest to decarbonize due to the long lifetimes of many industrial facilities and because many of the needed technologies are not yet commercially available. Furthermore, ensuring efficient equipment operations and maintenance helps to guarantee optimal energy performance. This can be reinforced by implementing energy management systems. Developing plant-level action plans and sharing best practices can also help improve energy efficiency, while governments can accelerate the process by adopting energy efficiency targets and regulations.

“On-premise: The largest segment by deployment in Energy management systems market”

The On-premise segment, by deployment, is projected to hold the largest market size during the forecast period. On-premise means that the energy management system is installed locally on a company's own servers and is far more expensive to design, build, and maintain. They are harder to evolve and update, with high maintenance costs. On-premise solution means that the control and data storage happens on a physical server. With the on-premise option, data can be read from the site in which it is installed and the hardware connected to this local network. Also, the real-time data can be seen, but it does not have analysis tools. On-premise deployments are more expensive because of the total cost of ownership, which generally includes hardware, network, backup, and development systems.

“Europe: The second largest region in Energy management systems market”

Europe is estimated to hold the second largest position in the Energy management systems market. The energy management systems market in Europe, by country, has been segmented into the UK, Germany, France, Italy, and the Rest of Europe.

The European Commission (EU) introduced the initial phase of its 'Fit for 55' package in July 2021, aiming to achieve a 55% reduction in the EU2's carbon emissions by 2030 compared to 1990 levels. This ambitious target sets the foundation for attaining climate neutrality in the EU by 2050, primarily through increased utilization of renewable energy sources. With well-established power generation, transmission, and distribution systems in Europe, the EU is now prioritizing the modernization of aging infrastructure, the

integration of solar and wind power, and the establishment of interconnections to enhance power and energy trading efficiency.

According to the European Commission, substantial investments exceeding USD 61 billion would be required annually for the expansion, replacement, and refurbishment of the power grid to integrate renewable energy production, a crucial step towards achieving the 55% emission reduction target by 2030. This presents an immense opportunity for the growth of the energy management systems market across the region. Moreover, the need to address supply power issues in Europe is expected to drive the demand for energy management systems, as monitoring and optimizing energy consumption becomes paramount in the transition to a more sustainable energy landscape.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 35%, Tier 2- 45%, and Tier 3- 20%

By Designation: C-Level- 35%, Director Levels- 25%, and Others- 40%

By Region: North America- 40%, Asia Pacific- 30%, Europe- 20%, the Middle East & Africa- 5%, and South America- 5%

Note: Others include product engineers, product specialists, and engineering leads.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2021. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: The Energy management systems market is dominated by a few major players that have a wide regional presence. The leading players in the Energy management systems market are ABB (Switzerland), Schneider Electric (France), Siemens (Germany), General Electric (US), and Emerson (US).

Research Coverage:

The report defines, describes, and forecasts the global Energy management systems market, by component, type, deployment, end-use industry, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a comprehensive review of the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market estimates, in terms of value and volume, and future trends in the Energy management systems market.

Key Benefits of Buying the Report

The report will help the leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the relay market and provides them information on key market drivers, restraints, challenges, and opportunities.

Analysis of key drivers (escalating energy consumption and price volatility, installation of smart grids and smart meters, government policies to increase energy efficiency and tackle climate change), restraints (high installation costs, extended payback period), opportunities (growth of urbanization and digitalization, subsidies on carbon and electricity tax policies), and challenges (lack of awareness in small and medium-sized businesses, hardware maintenance costs) influencing the growth of the energy management systems market.

Product Development/ Innovation: The future of the energy management systems market looks bright. ABB Power Grids, a subsidiary of ABB, signed a memorandum of understanding with the Indian Institute of Technology, Roorkee, to progress toward an innovative and sustainable campus energy ecosystem.

Market Development: The installation of smart grids and smart meters are driving the market. Smart meter supports the bidirectional flow of information. The smart meters deployed at end-user premises help collect information on electrical usage from all the appliances at regular intervals using the local area network. A smart grid increases power usage efficiency by introducing a bidirectional flow of information from utilities to consumers and vice-versa. This

can be possible by introducing Advanced Metering Infrastructure (AMI). The information about the electrical consumption of a consumer is recorded on time, and this data is aggregated and analyzed by a 'smart meter' installed at consumer premises. The analyzed data is then communicated to utilities using AMI. The AMI includes the advanced communication system, including home area networks (HAN), neighborhood area networks (NAN), and wide area networks (WAN). Thus, Advanced Metering Infrastructure not only communicates the smart meter data to utilities but also transmits information to consumers from utilities about the peak demand and cost of energy consumption, enabling the consumer to shift peak loads to some other time.

Market Diversification: Schneider Electric focused on product launches and expansions for the energy management systems market. The company launched several products in this market: . The product launches include the EcoStruxure Platforms and BlokSeT LV switchboard, PrismaSeT Active switchboards, next-generation TransferPacT Automatic Transfer Switching Equipment (ATSE), and TeSys Giga series as part of the EcoStruxure platform, which incorporated next-generation technologies. Schneider Electric expects an adjusted EBITA organic growth of between 9% and 13% in 2022. A strong and sustainable performance can be achieved through a combination of top-line organic growth, targeted at between 7% and 9%, and adjusted EBITA margins.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like ABB (Switzerland), Schneider Electric (France), Siemens (Germany), General Electric (US), and Emerson (US), among others in the energy management systems market

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