

# Microgrid Controller Market by Connectivity (Grid-connected, Off-grid), Offering (Hardware, Software & Services), End User (Commercial & Industrial, Military, Government, Institutes & Campuses, Healthcare) and Region - Global Forecast to 2029

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## Abstracts

The microgrid controller market is expected to reach USD 18.7 billion by 2029 from USD 6.8 billion in 2024, at a CAGR of 22.6% during the 2024-2029 period.

For more than a century, advanced economies have adhered to the principle of 'bigger is better' in electric power supply. Extensive grids were constructed to link power plants with residences and businesses via extensive networks spanning thousands of miles. Electricity generated by large, distant power plants, which are tied to centralized power grids and rely on fossil fuels, is transmitted across various regions and nations. However, the inefficiencies in power transmission inherent to these power plants have become increasingly apparent.

Traditional grids heavily rely on fossil fuels for electricity production, contributing to pollution and global warming. Moreover, these grids are susceptible to natural disasters, often resulting in network malfunctions or blackouts. For example, Hurricane Sandy in the US and Typhoon Haiyan in the Philippines caused widespread blackouts in major areas, including New York and the islands of Leyte. In the aftermath of such calamities, these regions faced prolonged periods without electricity, prompting a surge in demand for self-generating plants or microgrids. The occurrence of hurricanes, heatwaves, windstorms, wildfires, and other extreme weather events in 2020 led to a significant increase in power outages for electric utility customers in the US. According to PowerOutage US, there were 1.33 billion outages in 2020, marking a 73% rise from approximately 770 million in 2019.

The escalating demand for power also results in interruptions and outages. For instance, in April 2022, power outages were reported in various parts of Mumbai and its suburbs due to increased power demand. Mumbai's power demand during summers has risen to 3,800 megawatts (MW), surpassing the typical range of 3,200-3,300 MW. Although the state requires 25,000 megawatts of electricity, only 21 to 22,000 megawatts are currently being supplied.

Microgrids, with their value proposition centered on reliability, energy security, and power quality, emerge as an appealing alternative to centralized power distribution systems. They represent the next frontier in the electrification drive, enabling access to remote areas inaccessible to large grids. Microgrids can enhance electric service reliability, promote cleaner energy, reduce costs, and mitigate the impacts of power outages. Moreover, microgrids offer the potential to integrate smart technologies, such as smart meters, to enhance operational efficiency. These technologies enable microgrids to engage in demand response, strategically utilize energy storage, and provide grid services. Industries requiring uninterrupted power supply, such as hospitals, universities, refineries, pharmaceutical companies, data centers, and military installations, are driving the global demand for microgrids.

“Growing adoption of microgrids for rural electrification to increase in the demand of microgrid controller market.”

Microgrids are increasingly gaining traction globally, serving both, isolated installations for remote electrification and grid-connected assets to fortify resilient networks and foster local energy communities. According to the International Energy Agency (IEA), approximately 860 million individuals worldwide lacked access to electricity in 2020, with 87% residing in rural or remote regions ('SDG Indicators Goal 7' – 2020). In areas where access to the primary grid is unavailable or conventional grid extension proves prohibitively costly, microgrids emerge as a viable solution to energy access barriers. Moreover, microgrids offer a means to harness renewable energy sources within localized areas, positioning them as a practical choice for rural electrification initiatives. Notably, microgrids can be implemented in constrained spaces and provide electricity at reduced costs compared to traditional grid infrastructure. For instance, the University of California reports annual energy cost savings exceeding USD 8 million following the implementation of microgrids.

Another significant driver of the demand for microgrids in rural electrification efforts is the escalating government support and the surge in microgrid project deployments. For

example, in March 2021, GE (US) secured a contract to modernize three gas-insulated substations (GIS) in Khimti, Barhabise, and Lapsipedi in Nepal. These upgraded substations will deliver uninterrupted hydro energy to numerous households in regions outside Kathmandu, which still lack access to the national grid. In April 2021, the Indian Government's e-governance services arm, CSC, announced a collaboration with Tata Power to establish solar-powered microgrids and water pumps in rural areas across India. Similarly, in December 2020, Hitachi Energy (Switzerland) was commissioned by Ministry of Corporate Affairs (MCA) to contribute to the development of Sub-Saharan Africa's largest photovoltaic project, enhancing access to reliable and clean energy for Angola's population of 30 million people.

“Remote area end user of microgrid controller market recorded the highest market share in 2023”

Remote regions dominated the microgrid controller market in 2022, driven by the growing adoption of microgrid technologies in these areas. The integration of microgrids with hybrid generation proves particularly beneficial in regions lacking access to the primary utility grid. According to the International Energy Agency, approximately 1 billion people in remote locations worldwide lack access to electricity due to the high costs associated with fossil fuel-based generation, uncertainties in availability, and transportation challenges.

Governments across various nations are increasingly investing in electricity infrastructure development to provide affordable and clean energy. This has led to a surge in demand for microgrids in remote regions to both generate power and manage distributed energy resources effectively. For instance, in March 2021, General Electric secured a contract to upgrade three gas-insulated substations in Nepal, ensuring uninterrupted hydro energy supply to numerous households in regions outside Kathmandu that are still without access to the national grid. In April 2021, the Indian Government's e-governance services arm, Common Service Centres (CSC), announced a partnership with Tata Power to establish solar-powered microgrids and water pumps in rural and remote areas across the country.

Similarly, in December 2020, Hitachi Energy was awarded a contract by MCA to contribute to Sub-Saharan Africa's largest photovoltaic project, expanding access to reliable and clean energy for Angola's population of 30 million. In May 2019, ABB supplied an MGS100 integrated microgrid solution to facilitate the delivery of 100% renewable power and energy storage to up to 39,000 households in regions far from public utility infrastructure.

“US is expected to have the largest market share of microgrid controller in North America market in the forecast period”

In 2023, the US emerged as the primary driver of the microgrid controller market within North America. This dominance is fueled by the increasing adoption of sustainable energy sources, aimed at reducing reliance on conventional electricity grids. The country's robust growth trajectory in the microgrid controller sector is further propelled by substantial investments in clean energy initiatives. Notably, legislative actions like the introduction of H.R.1512, the Climate Leadership and Environmental Action for its Nation's Future Act, signal a significant commitment to decarbonization efforts, with allocated funding earmarked for microgrid development.

Furthermore, the recommitment to the Paris Agreement underscores the government's dedication to curbing carbon emissions, thereby encouraging widespread microgrid deployment across diverse industries.

Microgrids also play a pivotal role in ensuring energy resilience, particularly within critical sectors such as healthcare. Notably, in April 2020, Bloom Energy swiftly deployed microgrid systems for California-based hospitals, facilitating uninterrupted power supply during crises. Additionally, the US witnessed a surge in microgrid initiatives, with over 500 new projects initiated in 2019, prominently led by PowerSecure, Enchanted Rock, and the American Red Cross.

In March 2023, ABB is forging a strategic alliance with Direct Energy Partners (DEP) (US), a pioneering startup leveraging digital technology to expedite the adoption of Direct Current (DC) microgrids. This partnership entails a minority investment in Direct Energy Partners through ABB's venture capital arm, ABB Technology Ventures (ATV). Specific financial terms of the investment remain undisclosed.

In March 2023, Siemens Smart Infrastructure, in collaboration with Fluence, a key player in energy storage formed by Siemens and AES in 2018, completed a sustainable energy project on Terceira island, Azores, for EDA – Electricidade dos Açores. The project merges predictive energy software with a robust battery-based storage system, enhancing the integration of renewables like wind and solar into the grid. This blend is anticipated to slash CO2 emissions by over 3,600 tons annually. The Spectrum Power Microgrid Management System (MGMS) software implemented for EDA is part of Siemens Xcelerator portfolio, aiding global power utilities in their digital transformation.

In March 2022, Honeywell International Inc. and Duke Energy's Sustainable Solutions division have partnered to provide microgrid solutions to cities and communities across the United States, enhancing energy resilience during grid-level outages. Through this collaboration, Duke Energy's Sustainable Solutions offers distributed energy resources (DER) alongside Honeywell's battery energy storage systems (BESS) and smart cities software, facilitating the development of municipal microgrids and city-owned assets.

The break-up of the profile of primary participants in the Microgrid controller market-

By Company Type: Tier 1 – 55%, Tier 2 – 25%, Tier 3 – 20%

By Designation Type: C Level – 45%, Director Level – 30%, Others – 25%

By Region Type: Americas – 40%, Europe – 25%, Asia Pacific – 20%, RoW – 15%,

The major players in the microgrid controller market are Schneider Electric (France), General Electric (US), ABB (Switzerland), Siemens (Germany), Eaton (Ireland), Schweitzer Engineering Laboratories, Inc. (US), Honeywell International Inc. (US), Caterpillar (US), S&C Electric Company (US), Power Analytics Corporation (US), Cummins Inc. (US), Tesla Energy (US), Emerson Electric Co. (US), HOMER Energy (US), Hitachi Energy Ltd. (Switzerland), Pareto Energy (US), Encorp (US), Powerhive (Kenya), Enchanted Rock (US), AutoGrid Systems, Inc. (US), Heila Technologies (US), Ameresco, Inc. (US), PowerSecure, Inc. (US), Canopy Power (Singapore), Scale Microgrid Solutions LLC (US), and Spirae, LLC (US).

## Research Coverage

The report segments the microgrid controller market and forecasts its size based and region. The report also provides a comprehensive review of drivers, restraints, opportunities, and challenges influencing market growth. The report also covers qualitative aspects in addition to the quantitative aspects of the market.

## Reasons to buy the report:

The report will help the market leaders/new entrants in this market with information on the closest approximate revenues for the overall microgrid controller market and related segments. This report will help stakeholders understand the competitive landscape and

gain more insights to strengthen their position in the market and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers (Enhanced microgrid efficiency through controllers), restraints (Cybersecurity risks in microgrid control operations), opportunities (Increasing adoption of microgrids across healthcare, military, and government sectors), and challenges (Dynamic government regulation, policies, and standards)

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the microgrid controller market

Market Development: Comprehensive information about lucrative markets – the report analyses the microgrid controller market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the microgrid controller market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like Schneider Electric (France), General Electric (US), ABB (Switzerland), Siemens (Germany), and Eaton (Ireland).



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