

Power Plant Control System Market by Plant Type (Coal, Natural Gas, Hydroelectric, Nuclear, Oil, and Renewable), Solution (SCADA, DCS, Programmable Controllers), Component, Application, and Region - Global Forecast to 2026

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Abstracts

The global power plant control system market is projected to reach USD 10.2 billion by 2026 from an estimated USD 7.2 billion in 2021, at a CAGR of 7.3% during the forecast period. The growing need for zero downtime power supply solutions for critical power applications is the major driver of the rotary or power plant control system market. The advantages of rotary UPS such as high efficiency, fewer space requirements, and low lifetime costs are expected to further drive the demand. Increasing data center investments are expected to be the single biggest contributing factor to the growth of power plant control system market during the forecast period. However, Due to the COVID-19 pandemic, local currencies of many countries have depreciated. There is a misalignment of supply and demand, leading to financial losses for components/parts manufacturers. Key components used in manufacturing power plant control systems are procured typically in US dollars, which results in increased component cost, which is likely to hamper the growth of the power plant control system market.

“The renewable segment, by plant type, is expected to be the largest market from 2021 to 2026.”

The power plant control system market by type is categorized into 3 segments namely coal, natural gas, oil, hydroelectric, nuclear and renewable. Renewable plant types include solar, wind, and biofuels. Historically, fossil fuel-based plants, such as coal, oil, and gas power plants, have been the dominant contributors to the electricity generated globally. However, due to the increased focus on decarbonization and the global push

to reduce carbon emissions, the total investments in fossil fuel plants have declined significantly. Trends such as coal plant decommissioning, especially in Europe, and a significant slowdown of new investments in fossil fuel across the globe are the major drivers for investments in renewable plants. The global shift in power generation technology from fossil fuel to renewables in the key markets of Europe, North America, and Asia Pacific is expected to be the major driver during the forecast period.

“The hardware segment, by component, is expected to be the fastest-growing market from 2021 to 2026.”

The power plant control system market, by component, is segmented into hardware, software, and services. The hardware segment comprises controllers, input/output devices, workstations, and networking hardware. The hardware segment is expected to be the largest segment in the market, as the cost of hardware components accounts for a major share of the total control system cost. The amount of hardware required also scales with the level of complexity and the type of plant, especially in fossil fuel plants. Due to this, the hardware segment is expected to account for the largest market share during the forecast period.

“Asia Pacific: The largest market by region in the power plant control system market.”

Asia Pacific is expected to be the largest power plant control system market during the forecast period. Asia Pacific includes China, Japan, India, South Korea, Australia, and the Rest of Asia Pacific. The Rest of Asia Pacific includes Indonesia, Thailand, Vietnam, Malaysia, and Singapore. China and India are the largest markets for power plant control system in Asia Pacific. China alone accounted for more than half of the power plant control systems market in Asia Pacific in 2020. Continued fossil fuel power plant investments, especially in China, India, and Southeast Asia along with increased renewable power plant investments in countries such as China, India, Japan, and South Korea are expected to drive the demand for power plant control systems in the region.

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 and to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 65%, Tier 2- 24%, and Tier 3- 11%

By Designation: C-Level- 30%, Director Level- 25%, and Others- 45%

By Region: Asia Pacific- 50%, North America- 20%, Europe- 10%, Middle East- 8%, Africa- 7%, and South America- 5%

*Others include sales managers, engineers, and regional managers.

Note: Tier 1 Company—Revenue > USD 5 billion, Tier 2 Company—Revenue between USD 50 million and USD 5 billion, and Tier 3 Company—Revenue

The global power plant control system market is dominated by a few major players with an extensive regional presence and a few other local regional players. The leading players in the power plant control system market are Siemens Energy (Germany), ABB (Switzerland), Emerson (US), Rockwell (US), and GE (US)

Study Coverage:

The report defines, describes, and forecasts the power plant control system market by plant type, solution, application, component 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, including the analysis of the competitive landscape, market dynamics, market estimates in terms of value, and future trends in the power plant control system market.

Key Benefits of Buying the Report

1. The report identifies and addresses the key markets for power plant control system sales, which would help equipment manufacturers and service providers review the demand growth.
2. The report helps system providers understand the market's pulse and provides insights into drivers, restraints, opportunities, and challenges.
3. The report will help key players understand their competitors' strategies better and help them make better strategic decisions.

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*Details on Business Overview, Products/solutions Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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