

Preventive Diagnostics Market for Substation Equipment by Diagnostics Type (Partial Discharge, Dissolved Gas Analysis (DGA) & Oil-Gas, Thermal/Infrared, Insulating Gas Condition, Bushing, Mechanical, Vibration, & Acoustic Condition) – Forecast to 2036

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Abstracts

According to MarketsandMarkets, the preventive diagnostic market for substation equipment is projected to reach USD 3.46 billion by 2036 from USD 1.91 billion in 2026, at a CAGR of 6.1%. The global preventive diagnostic market for substation equipment is projected to expand significantly over the forecast period. The market is expected to witness strong growth, driven by the increasing adoption of AI-enabled analytics, industrial Internet of Things (IoT) sensors, cloud computing, advanced communication protocols, robotics, and digital twin platforms across power substations. Rising electricity demand, aging utility workforce challenges, increasing grid modernization expenditure, and the need to improve network reliability and reduce unplanned outages are accelerating investments in substation diagnostic technologies. Electric utilities are increasingly deploying connected dissolved gas analyzers, partial discharge monitors, smart sensor arrays, remote condition monitoring software, and automated testing workflows to enhance asset performance and operational efficiency.

"By type, the diagnostic devices segment to account for the largest market share during the forecast period"

Diagnostic devices are expected to account for the largest market share during the forecast period due to their high necessity, measurement precision, and critical role across substation condition monitoring applications. Diagnostic hardware platforms are

increasingly adopted for power transformers, switchgear, circuit breakers, bushing health tracking, and intelligent electronic device (IED) networks, where continuous physical data acquisition and real-time asset protection are essential. These devices enable electric utilities to detect thermal, mechanical, and electrical faults while supporting interoperability across substation automation systems and central control centers.

“By software, asset performance management & health analytics software to hold significant market share throughout the forecast period.”

Asset performance management & health analytics software is expected to account for the largest market share during the forecast period due to its scalability, advanced analytics capabilities, and compatibility with modern digital substation architectures. APM and health analytics platforms are increasingly adopted for power transformer fleet monitoring, switchgear health indexing, predictive failure forecasting, and automated risk scoring, where centralized data aggregation and multi-parameter diagnostics are essential. These platforms enable electric utilities to process complex condition monitoring telemetry while supporting interoperability across supervisory control systems, enterprise asset management software, and transmission operations.

"The Middle East to be the fastest-growing region in the preventive diagnostic market for substation equipment during the forecast period"

The Middle East is projected to be the fastest-growing region in the preventive diagnostic market for substation equipment during the forecast period, driven by increasing power grid digitalization, transmission infrastructure modernization, and investments in smart sensors, IoT devices, cloud analytics, and connected substation infrastructure across economies such as Saudi Arabia, the UAE, Qatar, and Kuwait. Growing electricity demand, extreme operating environments, technical workforce constraints, and the need to prevent catastrophic asset failures and improve operational reliability are accelerating the adoption of predictive substation technologies. Rising investments in online dissolved gas analysis (DGA), continuous partial discharge monitoring, asset performance management platforms, automated relay testing, advanced communication networks, and cybersecurity are further supporting regional market growth.

Breakdown of Primaries

A variety of executives from key organizations operating in the preventive diagnostic market for substation equipment were interviewed in depth, including CEOs, marketing directors, and innovation and technology directors.

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

By Designation: C-level Executives – 50%, Directors – 25%, and Others – 25%

By Region: North America – 50%, Europe – 30%, and Middle East – 20%

Note: Other designations include product, sales, and marketing managers. Three tiers of companies have been defined based on their total revenues as of 2025: Tier 3: revenue less than USD 100 million; Tier 2: revenue between USD 100 million and USD 1 billion; and Tier 1: revenue more than USD 1 billion.

Major players profiled in this report include Siemens Energy (Germany), GE Vernova (US), ABB (Switzerland), Hitachi Energy Ltd (Switzerland), Schneider Electric (France), Qualitrol Company LLC (US), Doble Engineering Company (US), OMICRON (Austria), Rugged Monitoring (Canada), and Dynamic Ratings (US), among others.

These companies compete by continuously enhancing substation preventive diagnostic capabilities, focusing on AI-enabled condition assessment, connected diagnostic sensors, cloud-based asset performance platforms, advanced failure analytics, automation, interoperability, and operational cybersecurity. Strategic emphasis is placed on developing integrated solutions that connect field monitoring, asset health indexing, and maintenance management workflows across power substations and transmission networks. Market participants prioritize improving grid reliability, operational efficiency, maintenance budget allocation, automated fault isolation, and data-driven decision-making across high-voltage utility environments. Strong focus is also placed on AI-enabled diagnostics, industrial IoT, remote transformer and switchgear monitoring, asset performance management platforms, robotics, digital twins, and advanced communication protocols. Continued investments in AI, cloud computing, connected substation infrastructure, predictive data analytics, and operational cybersecurity, along with collaborations across the electrical utility ecosystem, are expected to strengthen competition and accelerate the adoption of preventive diagnostic technologies globally.

The study provides a detailed competitive analysis of these key players in the market, presenting their company profiles, recent developments, technology portfolios, and key market strategies.

Research Coverage

This report on the preventive diagnostic market for substation equipment presents a detailed analysis based on diagnostic device types, software, and region. By type, the market is segmented into diagnostic devices and software. By diagnostic devices, it is segmented into partial discharge (PD) monitoring devices, dissolved gas analysis (DGA) & oil gas monitoring devices, thermal/infrared monitoring devices, insulating gas condition monitoring devices, bushing monitoring devices, mechanical & vibration & acoustic condition monitoring devices, and other diagnostic devices. By software, the market includes data acquisition & condition monitoring software, asset performance management (APM) & health analytics software, and predictive maintenance & decision support platforms. The regional analysis includes North America, Europe, and the Middle East, enabling evaluation of demand patterns, growth drivers, and industry trends.

Reasons to Buy 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 subsegments.

Key Benefits of Buying the Report

Analysis of key drivers (Rising demand for real-time grid monitoring due to renewable energy integration, Stringent grid safety and equipment inspection mandates), restraints (High installation costs and legacy-system integration complexity, Cybersecurity risks from connected substation infrastructure), opportunities (Digital twins for asset management and operational optimization, AI-based predictive analytics and remote diagnostics for condition-based maintenance), and challenges (Shortage of skilled personnel for advanced diagnostic systems, Hardware compatibility issues across legacy and modern equipment) influencing the growth of the preventive diagnostic market for substation equipment.

Market Development: Comprehensive information about lucrative markets by analyzing the preventive diagnostic market for substation equipment across

varied regions.

Market Diversification: Exhaustive information about new products/services, untapped geographies, recent developments, and investments in the preventive diagnostic market for substation equipment.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as Siemens Energy (Germany), GE Vernova (US), ABB (Switzerland), Hitachi Energy Ltd (Switzerland), Schneider Electric (France), Qualitrol Company LLC (US), Doble Engineering Company (US), OMICRON (Austria), Rugged Monitoring (Canada), and Dynamic Ratings (US), among others.

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