

Global Substation Automation Products Market, The

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Abstracts

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Nations are prioritizing their efforts to revitalize their decaying electric infrastructure by focusing on much-needed upgrades to their substations and ensuring these structures can be seamlessly connected to the Smart Grid.

The burgeoning industry of substation automation involves a plethora of devices, technologies, and business models that require a sophisticated approach to product selection, implementation, interoperability, and skilled engineering.

This SBI Energy report, **The Global Substation Automation Products Market**, examines the worldwide interest in smart substation development, including the market size and scope of the products, and the uneven pace at which nations are adopting the different substation automation architectures and designs.

The report covers a wide range of products and technologies used to automate substation processes and controls. Through interviews with substation industry experts and extensive secondary research, SBI Energy finds that from 2006-2010 the world has added approximately 2,200 new conventional substations per year, distributed disproportionately across the globe. That number is likely to slow as new construction projects continue to wane in favor of upgrades to established substations and other regions accelerate their movements to renewable energy sources.

Other key findings include:

SBI Energy forecasts the global market size for substation automation products to reach nearly \$106 billion by 2015. Many factors are driving the market growth

but the most predominant forces are the aging grid infrastructure, the influence of product marketers to provide multifunctional solutions that comply with strict communication protocols, and advancing technologies required to keep pace with electricity demand.

The average cost per substation automation initiative will grow at a much slower rate for the period 2011 to 2015 as regions lock in long-term contracts with suppliers and the cost of manufacturing goods sold also drops, especially in commodity product categories such as telecommunications.

Asia still maintains the greatest number of substations available for automation worldwide, with a 53% share in 2011. The bulk of Asia's smart substation spending, however, is concentrated on control/protection products and monitoring/recording products.

Much of Europe's focus on substation upgrades will be in retrofit of communication networks and SBI Energy expects that sector to realize upwards of a 10% CAGR for the five year period ending 2015 when sales will reach \$7.2 billion.

The U.S. will ease its investment in nearly all of the substation product categories, most notably monitoring/recording products where the market value will drop to \$6.8 billion by 2020 from \$11.2 billion in 2016.

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