

Partial Discharge Monitoring Systems Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented, By Type (Permanent Monitoring System and Temporary Monitoring System), By Application (GIS, Transformers, Power Cables, and Others), By Region, By Competition, 2020-2030F

<https://marketpublishers.com/r/PB207F87610CEN.html>

Date: July 2025

Pages: 180

Price: US\$ 4,500.00 (Single User License)

ID: PB207F87610CEN

Abstracts

Market Overview

The Global Partial Discharge Monitoring Systems (PDMS) Market was valued at USD 608.78 million in 2024 and is projected to reach USD 855.19 million by 2030, registering a CAGR of 5.67% during the forecast period. This market forms a key part of the electrical diagnostics and condition monitoring landscape, focusing on the detection and analysis of partial discharges (PD) in high-voltage electrical equipment. PD refers to localized dielectric breakdowns within insulation systems under electrical stress—an early warning sign of insulation degradation that can lead to serious equipment failures if left unchecked.

Market growth is being driven by the growing demand for predictive maintenance solutions, increased focus on asset reliability, and widespread grid modernization efforts. Utilities and industries are increasingly deploying PDMS to minimize downtime and operational risks in critical infrastructure such as transformers, gas-insulated switchgear (GIS), and power cables. The increasing digitalization of power infrastructure and the integration of advanced analytics into asset management strategies are further accelerating the adoption of PDMS across both developed and emerging markets.

Key Market Drivers

Rising Demand for Asset Reliability and Grid Modernization

A major factor fueling the growth of the partial discharge monitoring systems market is the increasing focus on improving grid reliability and modernizing aging infrastructure. As electric utilities and industries strive to minimize outages and reduce maintenance costs, there is a shift toward proactive asset health management. PD monitoring systems provide early detection of insulation defects in high-voltage equipment such as transformers, cables, and GIS, allowing for timely intervention before costly failures occur.

With increasing deployment of condition-based maintenance programs, asset operators are prioritizing real-time diagnostics to extend equipment life, enhance operational safety, and reduce unplanned service disruptions. Additionally, government-led initiatives focused on smart grid development and asset digitization, especially in regions like North America, Europe, and Asia Pacific, are driving widespread PDMS adoption.

Key Market Challenges

Technical Complexity and Integration Barriers in Partial Discharge Monitoring Systems

One of the key challenges facing the PDMS market is the technical difficulty involved in accurately detecting and interpreting PD signals within high-voltage environments. PD emissions are typically weak and often masked by background noise, requiring advanced signal processing, high-frequency detection, and sophisticated filtering mechanisms.

The integration of PD monitoring into existing infrastructure can also be complex, involving retrofitting sensors and ensuring compatibility with diverse insulation systems and grid communication protocols such as Modbus, IEC 61850, and OPC UA. Moreover, compliance with international standards like IEC 60270 and IEEE 1434 adds to system design complexity. These challenges pose barriers for manufacturers and end users, especially in legacy systems or developing regions with limited technical expertise and integration capabilities.

Key Market Trends

Growth of Predictive Maintenance and Asset Management as Drivers of PDMS

Adoption

The increasing adoption of predictive maintenance models and advanced asset management platforms is a defining trend in the PDMS market. Utilities and industries are moving away from time-based maintenance and are investing in real-time diagnostics to optimize performance and reduce lifecycle costs. PDMS enables early identification of insulation issues, feeding data into centralized platforms equipped with AI, machine learning, and analytics tools for predictive decision-making.

As organizations across sectors such as power generation, oil & gas, and manufacturing digitize their operations, PD monitoring has evolved from a stand-alone function to a core component of integrated condition monitoring systems. Modular, scalable PD solutions are now in demand, ranging from portable devices to continuous online monitoring systems with remote alarming and spectral diagnostics. Furthermore, the emergence of service-based offerings like PD-as-a-Service is enabling broader access to high-end monitoring solutions without significant capital investment, further boosting market expansion.

Key Market Players

Siemens AG

General Electric Company (GE Grid Solutions)

ABB Ltd.

OMICRON electronics GmbH

Megger Group Limited

Qualitrol Company LLC

Phoenix Contact GmbH & Co. KG

Schneider Electric SE

High Voltage Partial Discharge Ltd. (HVPD)

LumaSense Technologies, Inc. (Advanced Energy Industries, Inc.)

Report Scope:

In this report, the Global Partial Discharge Monitoring Systems Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Partial Discharge Monitoring Systems Market, By Type:

Permanent Monitoring System

Temporary Monitoring System

Partial Discharge Monitoring Systems Market, By Application:

GIS

Transformers

Power Cables

Others

Partial Discharge Monitoring Systems Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Partial Discharge Monitoring Systems Market.

Available Customizations:

Global Partial Discharge Monitoring Systems Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional Market players (up to five).

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