

United States Microgrid Market, By Type (Grid Connected, Remote/Island, Hybrid), By Consumption Pattern (Urban & Metropolitan, Semi-urban, Rural/Island), By Power Source (Natural Gas, Diesel, Solar PV, Fuel Cell and Others), By End User Industry (Educational Institutes, Military, Utilities, Industrial, Healthcare and Others), By Region, Competition, Forecast & Opportunities, 2016-2026F

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Abstracts

United States Microgrid Market stood at USD1492.31 million in 2020 and is forecast to grow at a CAGR of 9.31% until 2026. As per United States Department of Energy, microgrid is defined as a group of distributed energy resources (DERs) and interconnected loads surrounded by clearly defined electrical boundaries that behaves as a single controllable unit with respect to the grid. Power Quality refers to the quality of the voltage supplied in a certain area, which strongly depends on the load's characteristics and the transmission and distribution grid infrastructure in the area. Significant low voltage quality which can be caused in long distribution lines with asymmetric loads, eventually resulting in effects such as low and unbalanced voltage, voltage harmonics, and flicker in certain load locations. The situation ultimately leads to power disruption in several areas when demand surpasses actual generation, or the thermal constraints of the power system equipment risk the integrity of the power systems. Thus, a microgrid with an opportunity to disconnect from the utility grid in case of power quality problems may benefit the loads inside its borders significantly.

Based on power source, the market can be segmented into natural gas, diesel, solar pv, fuel cell and others. The natural gas segment dominated the market in 2020 due to

increasing push by the government to lower carbon emissions in power generation. United States being the world's largest natural gas producer has a bright future in the microgrid industry. Moreover, bringing the cost of this fuel source down and making it more readily available domestically thus would provide new options for power users. Moreover, the addition of natural gas generation not only allows for a continuous source to help even out the power supply, but it also opens the door for new operations within the microgrid.

Based on end user industry, the market can be segmented into educational institutes, military, utilities, industrial, healthcare and others. The educational institutes segment will dominate the market in forecast period as higher education is very sensitive to power outages for several reasons. For example, higher education hosts around USD80 billion annually in research and development, much of it heavily dependent on electricity. Moreover, aging of campus infrastructure across the United States and installation of new reliable, uninterrupted, and secure power supply system is going to drive the United States microgrid market.

Based on region, the market can be segmented into North-East United States, South United States, West United States and Mid-West United States, where North-east United States dominated the market in 2020. This can be attributed to the frequent storms in the region that caused widespread outages, due to which North-Eastern states are choosing microgrids as an alternative to keep the power on for vital services when utility grid is down.

Some of the major players in the United States Microgrid Market include Schneider Electric SE, General Electric Company, Hitachi ABB Power Grids Ltd., Bloom energy Corporation, Tesla, Inc., Enchanted Rock, Ltd. (ERock), S&C Electric Company, Ameresco Inc, PowerSecure Inc, Siemens AG etc. Major companies are developing advanced technologies and launching new services to stay competitive in the market. Other competitive strategies include mergers & acquisitions and new service developments.

Years considered for this report:

Historical Years: 2016-2019

Base Year: 2020

Estimated Year: 2021

Forecast Period: 2022-2026

Objective of the Study:

To analyze the historical growth in the market size of United States Microgrid Market from 2016 to 2020.

To estimate and forecast the market size of the United States Microgrid Market from 2021 to 2026 and growth rate until 2026.

To classify and forecast United States Microgrid Market based on type, consumption pattern, power source and end user industry.

To identify the dominant region or segment in the United States Microgrid Market.

To identify drivers and challenges for the United States Microgrid Market.

To identify and analyze the profile of leading players operating in the United States Microgrid Market.

To identify key sustainable strategies adopted by market players in the United States Microgrid Market.

TechSci Research performed both primary as well as exhaustive secondary research for this study. Initially, TechSci Research sourced a list of deployers and service providers across the country. Subsequently, TechSci Research conducted primary research surveys with the identified companies. While interviewing, the respondents were also enquired about their competitors. Through this technique, TechSci Research was able to include the deployers and service providers which could not be identified due to the limitations of secondary research. TechSci Research analyzed the deployers, energy service providers, distribution channels and presence of all major players across the country.

TechSci Research calculated the market size of the United States Microgrid Market using a bottom-up approach, wherein data for various end-user segments was recorded

and forecast for the future years. TechSci Research sourced these values from the industry experts and company representatives and externally validated through analyzing historical data of these service types and applications for getting an appropriate, overall market size. Various secondary sources such as company websites, news articles, press releases, company annual reports, investor presentations and financial reports were also studied by TechSci Research.

Key Target Audience:

Microgrid deployers, service providers and other stakeholders.

Maintenance and repair companies.

Organizations, forums and alliances related to Microgrid.

Government bodies such as regulating authorities and policy makers.

Market research and consulting firms.

The study is useful in providing answers to several critical questions that are important for the industry stakeholders such as deployers and service providers, end users, etc., besides allowing them in strategizing investments and capitalizing on market opportunities.

Report Scope:

In this report, the United States Microgrid Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

United States Microgrid Market, By Type:

Grid Connected

Remote/Island

Hybrid

United States Microgrid Market, By Consumption Pattern:

Urban & Metropolitan

Semi-urban

Rural/Island

United States Microgrid Market, By Power Source:

Natural Gas

Diesel

Solar PV

Fuel Cell

Others

United States Microgrid Market, By End User Industry:

Educational Institutes

Military

Utilities

Industrial

Healthcare

Others

United States Microgrid Market, By Region:

North-East United States

South United States

West United States

Mid-West United States

Competitive Landscape:

Company Profiles: Detailed analysis of the major companies present in the United States Microgrid Market.

Available Customizations:

With the given market data, TechSci 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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