

North America Energy Management System Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Component (Hardware, Software, and Services), System Type (Industrial Energy Management System, Building Energy Management System, and Home Energy Management System), and End-Use Industry (Energy and Utilities, Manufacturing, Telecom and IT, Residential and Commercial, and Other End-Use Industries)

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Abstracts

The North America Energy Management System (EMS) Market is projected to grow significantly, reaching an estimated US\$ 37,277.2 million by 2031, up from US\$ 17,720.4 million in 2024. This growth represents a compound annual growth rate (CAGR) of 11.2% from 2024 to 2031.

Executive Summary and Market Analysis

In North America, particularly in the United States and Canada, a robust infrastructure supports manufacturing firms in pushing the boundaries of science, technology, and commerce to enhance production capabilities. The manufacturing sector is bolstered by technological advancements, with the National Institute of Standards and Technology (NIST) reporting that the U.S. manufacturing industry was valued at US\$ 2.3 trillion, contributing 10.2% to the national GDP in 2023. The U.S. ranks as the second-largest manufacturing nation globally, trailing only China, and is a leader in producing

fabricated metal products.

The aerospace and defense sectors are also experiencing substantial growth in North America, driven by a stable economy, advanced infrastructure, high technology adoption rates, and increased government investments. According to Airlines for America, commercial aviation contributed approximately US\$ 1.37 trillion to the U.S. economy in 2023, accounting for about 5% of the GDP. With over 26,000 daily flights transporting 2.6 million passengers to nearly 80 countries, the demand for energy is expected to rise significantly, necessitating enhanced energy management systems in airports, fueling stations, and commercial buildings.

Strategic Insights

Market Segmentation

The North America EMS market is categorized by several factors:

By Component: The market is divided into Hardware, Software, and Services, with Hardware holding the largest market share in 2024.

By System Type: It includes Industrial Energy Management Systems, Building Energy Management Systems, and Home Energy Management Systems, where Industrial Energy Management Systems dominate the market.

By End-Use Industry: The segments include Energy and Utilities, Manufacturing, Telecom and IT, Residential and Commercial, among others, with Manufacturing leading in market share in 2024.

Market Outlook

The reliance on data centers is increasing among government agencies and technology firms for various applications, from hosting infrastructure to supporting data-driven services. For instance, Microsoft has invested over US\$ 15 billion in data centers across 140 countries. However, the operational costs of these data centers are soaring, with the U.S. Chamber of Commerce noting that a typical data center allocates about 40% of its annual budget (approximately US\$ 7.4 million) to power its systems. Data centers consume around 3% of global electricity, with U.S. data centers accounting for nearly 2% of the nation's electricity consumption. In 2023, they consumed about 4% of total

electricity, with projections suggesting this could rise to between 6% and 12% by 2028.

To address these challenges, governments are promoting energy efficiency in data centers through initiatives aimed at reducing energy consumption. The U.S. Department of Energy's Federal Energy Management Program (FEMP) encourages organizations to improve data center efficiency, aligning with broader strategies to enhance cloud computing capabilities.

Country Insights

The North America EMS market is primarily segmented by country into the United States, Canada, and Mexico, with the U.S. holding the largest market share in 2024. The manufacturing sector's contribution to the U.S. economy is significant, with a value of US\$ 2.3 trillion, representing over 11.4% of the GDP in 2023. The U.S. ranks second globally in manufacturing output, necessitating continuous investments in infrastructure and the adoption of innovative manufacturing technologies. This growing demand for electricity in manufacturing operations is driving the adoption of energy management solutions.

The U.S. infrastructure is under pressure, particularly in sectors like oil and gas, energy, heavy machinery, automotive, and aviation, highlighting the need for upgrades and expansions. Recent investments in public infrastructure, such as the US Federal Aviation Administration's US\$ 1 billion funding for airport improvements and the Biden-Harris administration's US\$ 8.2 billion investment in key rail projects, are expected to further increase electricity demand, thereby propelling the growth of the EMS market.

Company Profiles

Key players in the EMS market include International Business Machines Corp, ABB Ltd, Schneider Electric SE, Emerson Electric Co, General Electric Co, Honeywell International Inc, Siemens AG, Eaton Corporation plc, Mitsubishi Electric Corp, and Johnson Controls International Plc. These companies are pursuing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative solutions to consumers.

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