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Distribution Automation Market by Offering (Field Devices, Software, Services), Communication Technology (Wired (Fiber Optic, Ethernet, Powerline Carrier, IP), Wireless), Utility (Public Utilities, Private Utilities) and Region - Global Forecast to 2029

Market Report | 2024-05-15 | 302 pages | MarketsandMarkets

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Report description:

The distribution automation market is estimated to grow from USD 19.3 billion in 2024 to USD 36.5 billion by 2029, at a CAGR of 13.6% during the forecast period. The market is primarily driven the need for the improved grid infrastructure and governmental initiatives to provide last mile connectivity of electricity.
"Field devices, by offering, expected to be second largest market from 2024 to 2029"
The distribution automation market, by offering, is bifurcated into field devices, software and services. The software segment is expected to second largest segment during the forecast period. Software assists grid operators in increasing the reliability and efficiency of grid operations. In the realm of Distribution Automation for electricity, software plays a vital role, offering diverse applications aimed at bolstering the operational efficiency of distribution power systems. These software solutions empower utility companies to gather, automate, scrutinize, and refine data, thereby enhancing the efficacy of their distribution networks. Specifically designed for distribution automation systems, these software components furnish real-time operational alerts concerning various grid elements, such as fault detectors, voltage regulators, capacitor controllers, and switches. This data is then shared with other intelligent field devices, and algorithms integrate it with transmission systems to optimize distribution system performance.
"Wireless, by communication technology expected to be second largest market from 2024 to 2029"
The distribution automation market, by communication technology, is segmented into wired and wireless. The wireless segment is expected to second largest segment during the forecast period. Wireless radio technologies like CDMA are employed in smart grids for distribution automation. These technologies offer cost-effectiveness and durability, rendering them ideal for small-scale

distribution automation systems (DAS), especially in areas where setting up a communication network is difficult. Wireless communication is well-suited for feeder reconfiguration, facilitating system monitoring and control from the substation to the customer's meter. This serves various purposes, including enhancing system reliability, minimizing power losses, and handling voltage fluctuations.

"Private utilities, by utility, expected to be fastest market from 2024 to 2029"

The distribution automation market, by utility, is bifurcated into public utilities and private utilities. The private utilities segment is expected to be the fastest market during the forecast period. Privatizing electricity generation and distribution has been discussed in a number of nations, with various techniques taken to increase competition and improve sector efficiency. Private utilities are investing in technologies like IoT and 5G, which enable more robust and real-time data sharing, allowing them to make data-driven decisions to meet rising energy demand.

"Asia Pacific is expected to be the largest region in the distribution automation market."

Asia Pacific is expected to have highest market during the forecast period. The demand for distribution automation in Asia Pacific is driven by the exponential increase in demand for the electricity especially from rural areas. Several reasons contribute to the Asia Pacific region's dominance in the Electricity Distribution Automation industry. First, the region's population rate are fast increasing, resulting in increased demand for electricity. Demand for distribution automation in Asia Pacific is driven by the exponential increase in demand for the electricity especially from rural areas. Second, the region is seeing a major growth in the integration of renewable energy sources, such as solar and wind, into the electricity system. Distribution automation systems play an important role in seamlessly integrating these intermittent sources into the grid, generating demand for these technology in the region.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 65%, Tier 2- 24%, and Tier 3- 11%

By Designation: C-Level- 30%, Director Level- 25%, and Others- 45%

By Region: North America - 20%, Europe - 25%, Asia Pacific - 30%, South America - 10%, and Middle East & Africa - 15%

Note: Other designations include sales managers, marketing managers, product managers, and product engineers.

The tier of the companies is defined based on their total revenue as of 2023. Tier 1: USD 1 billion and above, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: <USD 500 million.

The Distribution automation market is dominated by a few major players that have a wide regional presence. The leading players in the distribution automation market are ABB (Switzerland), Schneider Electric (France), Siemens (Germany), Eaton (Ireland) and General Electric Company (US).

Research Coverage:

The report defines, describes, and forecasts the distribution automation market, by offering, communication technology, utility, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a comprehensive review of the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market, which include the analysis of the competitive landscape, market dynamics, market estimates in terms of value, and future trends in the distribution automation market.

Key Benefits of Buying the Report

- Governmental initiatives to provide last mile connectivity of electricity, and boost in Smart Grid Infrastructure are few of the key factors driving the distribution automation market. Factors such as high installation costs of distribution automation systems restrain the growth of the market. The need for greater flexibility and control in electricity supply is expected to present lucrative opportunities for the players operating in the distribution automation market. The threats posed by the lack of skilled personnel and the increasing threat of automated cyber-attacks pose a major challenge for the players, especially for emerging players operating in the distribution automation market.
- Product Development/ Innovation: The distribution automation market is witnessing significant product development and innovation, driven by the growing demand for smart grid infrastructure.

- Market Development: Siemens and Areti have announced their collaboration on the RomeFlex project, aimed at addressing congestion and voltage fluctuations within the strained power grids of Italy's capital city. Areti, playing a pivotal role in Italy's energy transition, has devised an innovative local flexibility market architecture, which will be further enhanced by Siemens' expertise in the energy domain and specialized technology. Over the next decade, it's anticipated that peak electricity demand on Rome's DSO power grid will rise from 2,200 MW to 3,300 MW. To effectively manage this surge in energy demand and mitigate potential grid challenges such as blackouts or voltage issues, Areti is rapidly increasing its grid capacity, accelerating its digital transformation to usher in the next era of grid management.
- Market Diversification: Siemens has unveiled its latest Gridscale X software. This product empowers Independent System Operators (ISOs) and Transmission System Operators (TSOs) to centrally oversee their network data using a Digital Twin of the power grid, enhancing efficiency in planning, development, and operations. The Gridscale X Network Model Manager adeptly manages various grid scenarios, including the integration of new or changing assets, streamlines project management, and encourages collaboration among utilities. Designed with cloud readiness and full accessibility via APIs, the software features a modular architecture and state-of-the-art user interface. Positioned as the next evolution in Siemens' network model management offerings, the Gridscale X Network Model Manager is a component of Siemens Xcelerator, an open digital business platform facilitating customers' digital transformation journey.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players, like include ABB (Switzerland), Schneider Electric (France), Siemens (Germany), Eaton (Ireland) and General Electric Company (US), among others in the distribution automation market.

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