

## **Europe Energy Management Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 141 pages | Mordor Intelligence

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### **Report description:**

The Europe Energy Management Systems Market size is estimated at USD 19.64 billion in 2025, and is expected to reach USD 38.76 billion by 2030, at a CAGR of 14.57% during the forecast period (2025-2030).

#### Key Highlights

- **Smart Grid Revolution Drives Market Growth:** The Europe Energy Management Systems (EMS) market is undergoing significant expansion, driven by the adoption of smart grid technologies and smart meters. These innovations are transforming the energy sector, with substantial investments being made to modernize grids across Europe.
- **Smart grid investment:** Investment in Europe's smart grid infrastructure reached USD 56.7 billion in 2021, showing notable growth from USD 48.7 billion in 2017.
- **Smart meter adoption:** The European Union aims to install 225 million smart electricity meters and 51 million gas meters by 2024, with 80% of consumers targeted to be equipped with smart meters.
- **UK smart meter installations:** In Great Britain, the number of smart meters installed by large energy suppliers surged from 135,090 in Q2 2020 to 979,752 in Q2 2021, reflecting rapid adoption rates.
- **Energy Efficiency Takes Center Stage:** Rising investments in energy efficiency are fueling the demand for EMS solutions as governments and businesses recognize the benefits of optimized energy use.
- **EU energy efficiency target:** The European Union has set a goal of increasing energy efficiency by at least 32.5% by 2030, driving demand for energy-efficient solutions.
- **Germany's efficiency drive:** Germany aims to cut primary energy consumption by 30% by 2030 compared to 2008, pushing demand for advanced EMS technology.
- **Turkey's efficiency investments:** Turkey plans to invest over USD 10 billion in energy efficiency over the next decade, with projected savings of USD 30 billion by 2033.

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- HVAC Demand Surges Amid Population Growth: Demand for Heating, Ventilation, and Air Conditioning (HVAC) systems is growing rapidly, driven by population increases and changing climate conditions, creating a new market for EMS providers.
- Population growth: Europe's population grew to 743.5 million in 2022, up by 4.6 million since 2012, increasing demand for new housing and HVAC systems.
- HVAC demand: The demand for air conditioning devices in Europe hit 8.9 million units in 2021, with Russia leading in sales at 1.9 million units.
- New HVAC plant investment: Mitsubishi Electric Corporation invested USD 113 million in a new air-conditioner production plant in Turkey, boosting production capacity by 100,000 units annually.
- Competitive Landscape Shapes Market Dynamics: The European EMS market is highly competitive, with both established players and startups working to gain market share.
- Key market players: Leading companies include Schneider Electric SE, Honeywell International Inc., Panasonic Corporation, and Enel X S.r.l.
- Schneider Electric's dominance: With 135,000 employees, Schneider Electric leads in providing comprehensive energy management software.
- Emerging players: Startups such as Green Energy Options Limited and Efergy Technologies S.L. are gaining traction in the residential EMS market with in-home energy monitoring devices.
- Future Outlook: Integration and Innovation: The future of Europe's EMS market looks bright, with technological advancements and integration with other smart systems expected to drive further growth.
- Energy storage growth: The European Union's energy storage capacity is expected to reach 187 GW by 2030 and 600 GW by 2050, necessitating advanced EMS solutions.
- AI and machine learning adoption: AI and machine learning are poised to enhance EMS capabilities, as countries like France invest EUR 2.2 billion in AI strategies.
- Distributed energy systems: The shift towards decentralized energy and increasing adoption of renewable energy will require sophisticated EMS to manage more complex energy ecosystems.

## Europe Energy Management Systems Market Trends

### Building Energy Management Systems (BEMS) Segment Drives Market Growth

Urbanization and energy efficiency regulations have positioned Building Energy Management Systems (BEMS) as the largest segment in the Europe EMS market.

- Market value: BEMS was valued at USD 9.38 billion in 2022 and is projected to reach USD 17.67 billion by 2028, growing at a CAGR of 11.2%.
- Urbanization impact: The rise in urbanization and stringent energy efficiency laws across Europe drive the demand for BEMS solutions.
- Smart Building Technologies Fuel Growth: The increasing adoption of smart building technologies, which leverage advanced software and hardware, is a significant growth driver for the BEMS segment.
- AI integration: Government investments in artificial intelligence, such as France's EUR 2.2 billion (USD 2.46 billion) AI strategy, are expected to further fuel BEMS market growth.
- Technological innovation: Smart building technologies are enabling enhanced energy management, contributing to the adoption of EMS across commercial sectors.
- Government Initiatives Propel Market Expansion: Regulatory mandates like the Energy Efficiency Directive (EED) compel European nations to adopt EMS solutions, boosting market growth.
- Energy audits: The EED mandates energy audits and EMS adoption, pushing companies to develop innovative products for

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commercial customers.

## Commercial Sector Segment is Expected to Hold Significant Market Share

The commercial sector remains a major adopter of BEMS, with rising construction activity driving growth.

- Commercial market size: Valued at USD 2.02 billion in 2022, the commercial BEMS market is expected to grow at a CAGR of 12.3% and reach USD 4.04 billion by 2028.
- Construction boost: The UK saw a 27.7% increase in private commercial construction orders in Q3 2022, further driving BEMS adoption.
- Home Energy Management Systems (HEMS): Fastest-Growing Segment
- The HEMS segment is the fastest-growing in the European EMS market, spurred by the smart home trend.
- Rapid growth: HEMS is projected to grow from USD 4.61 billion in 2022 to USD 13.98 billion by 2028, registering a CAGR of 20.1%.
- Smart home integration: The rise in networked smart home technologies has made HEMS increasingly attractive to consumers.
- Technological Advancements Drive Adoption: HEMS adoption is supported by technological advances in communication mediums and smart devices.
- Home area networks (HANS): Bi-directional communication technologies are advancing home energy management, contributing to the rising demand for HEMS.
- Software solutions lead: Software solutions dominate the HEMS market, with a projected CAGR of 22.0% from 2023 to 2028, compared to hardware's 18.9%.
- Strategic Partnerships Accelerate Market Expansion: Key industry partnerships are expanding HEMS offerings, enabling broader market penetration.
- Eaton and LG partnership: Eaton's collaboration with LG Electronics in February 2022 exemplifies how strategic partnerships enhance HEMS solutions and drive market growth.

## Europe Energy Management Systems Industry Overview

The European EMS market is dominated by global players with strong market positions and technological expertise.

Market leaders: Schneider Electric, Honeywell International, and Panasonic Corporation are key players with comprehensive product portfolios.

Consolidated market: The EMS market is consolidated, with top players leveraging their R&D investments and global reach to maintain leadership.

Innovation and Technological Prowess Drive Leadership: Innovation is central to maintaining leadership in the EMS market, with top companies investing heavily in technology.

R&D investment: Companies like Schneider Electric invest significantly in R&D to develop advanced energy management solutions, securing their market positions.

Partnerships drive innovation: Collaborations, such as Schneider Electric's partnership with Hitachi Energy, are helping companies innovate and expand in renewable energy management.

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Strategies for Future Success in the EMS Market: Key strategies for success in the EMS market include smart grid investments, IoT-based automation, and compliance with energy regulations.

Smart grid focus: Companies are increasingly focusing on smart grid technologies and building automation as part of their EMS strategies.

Regulatory adaptation: Adapting to new energy regulations will be critical for maintaining a competitive edge in the evolving EMS landscape.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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