

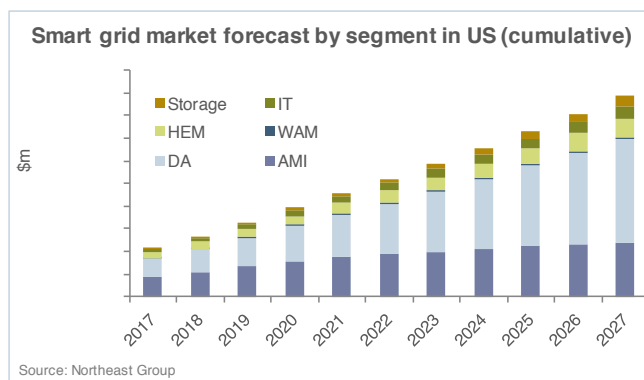
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United States Smart Grid: Market Forecast (2017 – 2027)

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US Smart Grid: Market Forecast (2017-2027)

The United States has one of the most mature smart grid infrastructure markets in the world. Still, as of January 2017, only half of the US residential meter market is equipped with two-way communicating advanced metering infrastructure (AMI), leaving ample room for further growth. Beyond AMI, distribution automation (DA) presents the largest market opportunity in the US over the next decade.



The US experienced a jump in smart grid infrastructure investment at the start of the current decade. As part of the federal government's broader economic stimulus efforts after the financial crisis, the Smart Grid Investment Grant program (SGIG) led to nearly \$8 billion in smart grid build out from 2010 to 2015, over half of which was directed to AMI deployments. Several US states have also begun issuing requests for smart grid investment plans from investor-owned utilities (IOUs). With each state determining its own regulations, there is a wide variance of smart grid deployment progress across the country. Several of the country's largest IOUs have completed full AMI deployments, including Southern California Edison, Pacific Gas & Electric, Florida Power & Light, Oncor, and Georgia Power. Other utilities and other market segments have significant room for further growth.

US-based vendors have a strong foothold in their home market. These include leading US-based metering and communications vendors such as Aclara (which acquired GE's metering assets and Tollgrade's grid assets), Cisco, Honeywell (through acquired German metering vendor Elster), Itron, Sensus, Silver Spring Networks, Trilliant and others. Other US vendors such as Eaton, GE, Oracle, S&C and SEL dominate other smart grid market segments. The leading smart grid vendors from abroad have also staked a claim in the US market, including Swiss-based Landis+Gyr as well as grid vendors ABB, Schneider and Siemens, among others.

Key questions answered in this study:

- How large will the US smart grid market be over the next decade?
- Which utilities present the largest remaining opportunities in the US market?
- Where will the next major smart meter rollouts occur?
- How will the convergence of DA and AMI communications impact the smart grid market?
- What is the market share of US-based and international vendors in the US market?

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