Demand for distributed control systems (DCS) from the electric power generation industry remains weak, and growth from this vertical is expected to remain sluggish over the forecast period. Several factors contribute to the decline in DCS spending for electric power. First is the shift in primary energy sources for electric power generation going on worldwide. Coal is being replaced by a combination of natural gas (used primarily in combined-cycle generating plants) and renewables. CapEx spending in coal-fired power generation projects is shrinking globally. Nuclear power is also declining in global importance, and instead will become an important source only in some countries. Developing economies are increasingly focusing on renewable energy, which will continue to inhibit DCS growth in the power industry over the forecast period. Regulatory policy is a critical factor in promoting capital investment in the industry. Although major capital investment occurs several times over the life of most generating plants, investments are typically made when owner-operators are confident the regulatory policy will support their investment for years going forward. For older plants in developed countries, policy uncertainty is higher due to the penetration of renewables and changes to the operation of electric systems.

For more information about this research, please contact your ARC Client Manager or visit us at www.arcweb.com/market-studies/.

Both automation suppliers and end users strive to get more value from their automation systems. Some key strategic issues covered in the report include:

- Address plant assets in a lifecycle context
- Address the utility-scale renewables market
- Load growth slowing in developing regions
- Low to zero load growth in developed regions

This research is available as a Market Intelligence Workbook (Excel) and/or a concise, executive-level Market Analysis Report (PDF), with or without detailed charts.

### RESEARCH FOCUS AREAS

**STRATEGIC ANALYSIS**
- Major Trends
- Regional Trends
- Strategic Recommendations

**COMPETITIVE ANALYSIS**
- Market Shares of the Leading Suppliers
- Market Shares by Region
  - North America
  - Europe, Middle East, Africa
  - Asia
  - Latin America
- Market Shares by Revenue Category
  - Hardware
  - Software
  - Services

**MARKET FORECASTS & HISTORIES**
- Total Shipments of DCS for the Electric Power Generation Industry
- Shipments by Region
- Shipments by Revenue Category
- Shipments by Hardware Type
- Shipments by Service Type
- Shipments by Plant Type
- Shipments by System Size
- Shipments by Application
- Shipments by Project Type
- Shipments by Customer Type
- Shipments by Sales Channel

**MARKET SHARE REPORTS**
- Market Shares by Application
  - Batch
  - Continuous Process
  - Quality
  - Supervisory Control
- Market Shares by Project Type
- Market Shares by Customer Type
- Market Shares by Sales Channel

**INDUSTRY PARTICIPANTS**
- The research identifies all relevant suppliers serving this market.