

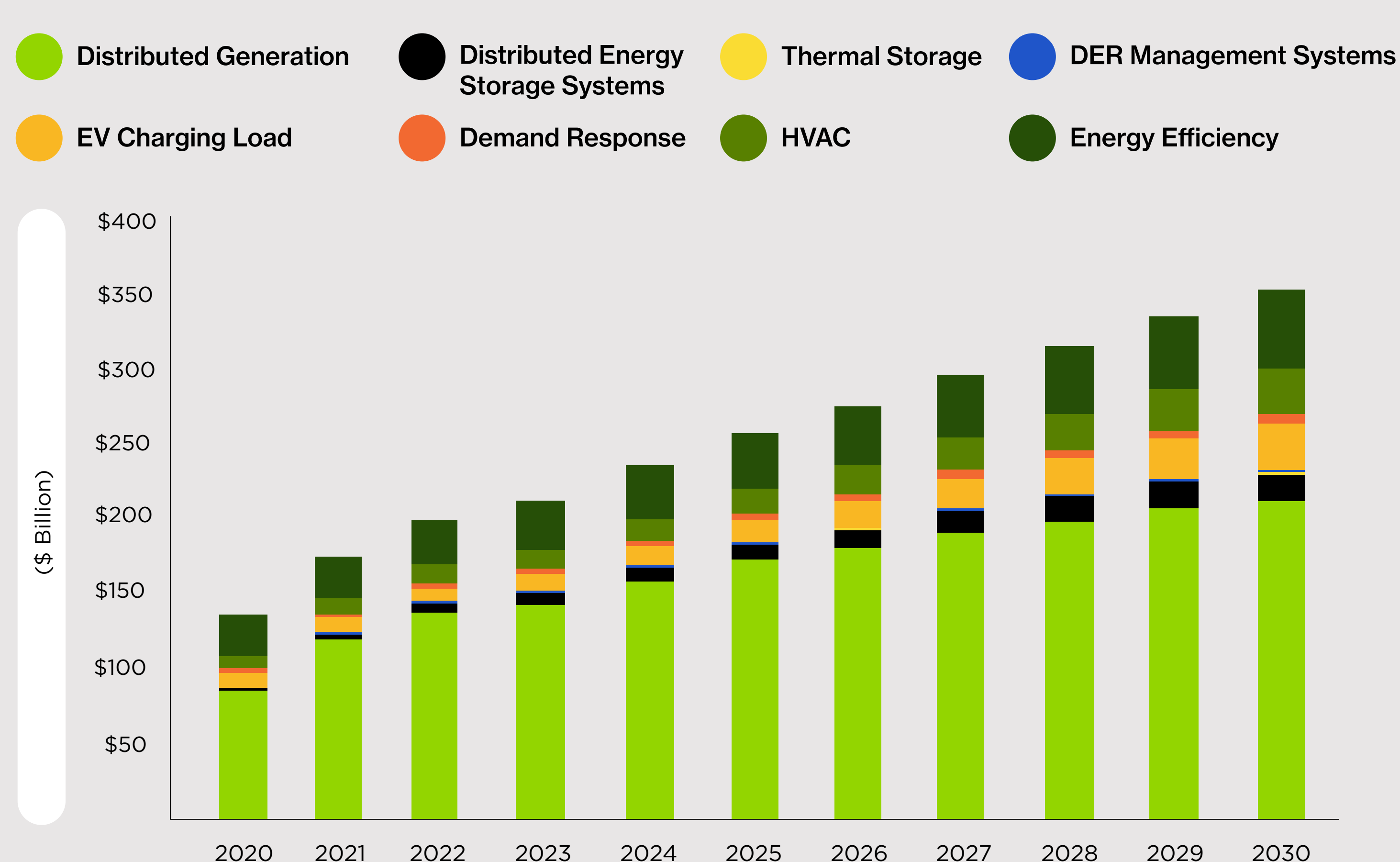
# DER Heralds an Era of Global Energy Resilience

Distributed energy resources (DER) have played a critical role in the transition of the traditional energy industry into a distributed ecosystem. This infographic aggregates Guidehouse Insights forecasts across 14 DER technologies to measure the speed at which DER is being deployed globally and the scale of this important trend.

## Global DER Deployment Will Triple in the Next Decade

Digital technologies and DER energy management tools can help energy stakeholders take control of potential disruptions from supply chain optimizations to storage for managing intermittency. Driven by technology and digital tools, the energy sector can identify opportunities to make their end-to-end value chain more efficient and agile.

### Annual Total DER Revenue by Technology, World Markets: 2020-2030



## Highlights

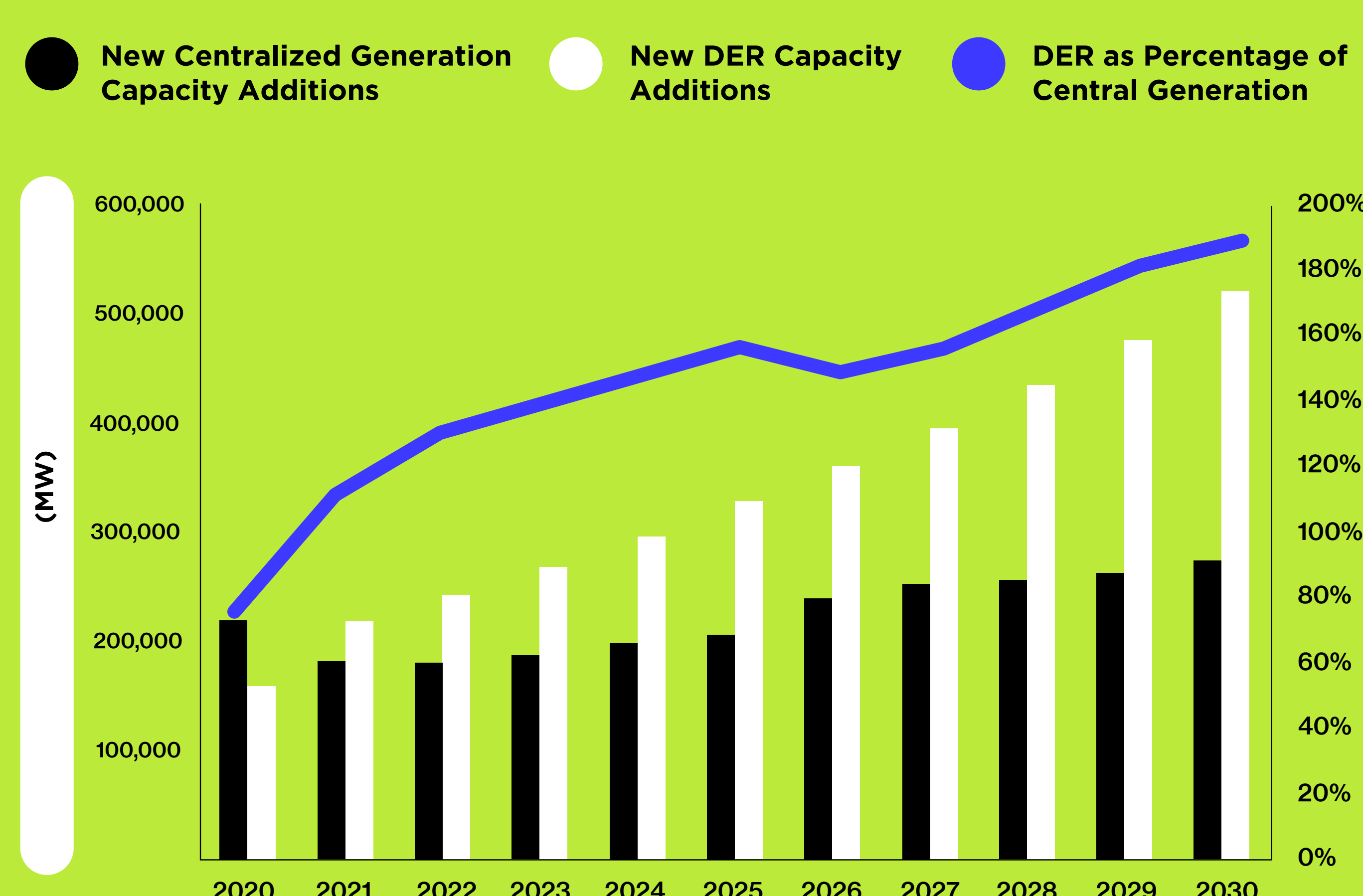
- The global DER market will shrink by 22%, or 151 GW, from previous estimates due to current market challenges
- The DER market will experience a 12.8% compound annual growth rate over the next decade
- Asia Pacific will account for nearly half of all global DER installations in 2020
- Distributed generation will continue to lead new installations across all DER over the next decade
- Solar PV will account for more than one-fourth (26%) of annual DER installations in 2020
- EV charging is expected to make up more than 30% of the capacity market in 2020
- Total DER revenue in 2030 is estimated to cross \$350 billion
- Global cumulative DER capacity is estimated to exceed 4 TW by 2030
- Aggregation strategies and new business models will drive growth

## Current Market Drivers & Barriers

| Drivers   | Barriers  |
|---|---|
| Decarbonization and clean energy requirements           | Global impacts of Covid-19                            |
| Increasing demand from residential and C&I customers    | Uncertainty of financial return on investments        |
| Aggregation strategies and new business models          | Supply chain bottle necks                             |
| Increasing technological investment and declining costs | Lack of monetization routes and investment priorities |

## Global DER Deployment Will Outpace Centralized Generation

### Annual DER vs. Annual Central Generation Capacity Additions, World Markets: 2020-2030



## DER Database Service

| Service Components  | Service Coverage   | Service Usage   |
|---|--|---|
| Twice yearly updates to interactive dashboards and four insight reports on emerging trends, covering five regions worldwide and 14 countries. | Residential, commercial, industrial, and institutional technologies include diesel gensets, natural gas gensets, stationary fuel cells, microturbines, solar PV, wind, and distributed energy storage. | Users leverage this flexible database tool to perform a wide range of analysis. From insightful market analyses to more advanced geographic analyses, market estimates and other information can be aggregated to generate additional insights. |

## Our Data Insights Subscription Service

We provide subscribers with actionable data and quantitative analysis to better understand the impact of emerging technology solutions across critical industries like energy, transportation, and the built environment. The service is global in scope, providing regional and country-level segmentation.

Designed around a flexible and interactive interface, the service draws upon disparate data sources, including proprietary research reports, trackers, analyst knowledge, and primary interviews. It also includes quarterly insight reports featuring subject matter expert commentary and analysis on emerging global and regional trends.

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