

Global Eco-friendly Circuit Breaker Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Eco-friendly Circuit Breaker market size was valued at US\$ 33.52 million in 2025 and is forecast to a readjusted size of US\$ 162 million by 2032 with a CAGR of 25.3% during review period.

170/245/420 kV eco-friendly circuit breakers (Eco-friendly / SF₆-free High-voltage Circuit Breakers) refer to circuit breakers used in power transmission systems with rated equipment voltages ranging from approximately 145–170 kV, 220–252 kV, and 400–420 kV. These high-voltage AC circuit breakers utilize technologies such as vacuum arc extinction, clean air, CO₂/O₂, and C₄-FN+CO₂/O₂ to completely or significantly reduce the use of traditional SF₆ insulation and arc-quenching media.

This product primarily handles normal switching operations and short-circuit fault clearance for transmission lines, transformers, reactors, capacitor banks, and large-scale renewable energy grid-connection systems. Product configurations include Live Tank Circuit Breakers (porcelain-column or column-type), Dead Tank Circuit Breakers (tank-type), and circuit breaker modules integrated into GIS.

By 2025, global sales of Eco-friendly High-voltage Circuit Breaker are projected to reach 84 units, with an average price of \$386,500 per unit.

Industry Development Trends

A true demand inflection point is expected around 2032

EU Regulation (EU) 2024/573 stipulates that, effective January 1, 2032, high-voltage switchgear with a voltage exceeding 145 kV or a short-circuit current exceeding 50 kA is, in principle, prohibited from using fluorinated greenhouse gases with a Global Warming Potential (GWP) of ≥ 1 as insulation or interrupting media, with limited technical and supply exceptions. This directly covers the 245 kV and 420 kV markets and is one of the clearest medium- to long-term drivers for environmentally friendly high-voltage circuit breakers worldwide.

“SF₆-free” will gradually evolve into “completely F-gas-free”

This is the most noteworthy technological shift to watch for in the future. Solutions such as C4-FN/g³ can significantly reduce the greenhouse effect and more easily maintain the compact structure of traditional SF₆ equipment, giving them a clear engineering advantage in the 420 kV sector at present; however, since the 2032 European regulations favor a GWP < 1, the “Clean Air+Vacuum” solution offers greater long-term policy certainty. Siemens Energy is expanding the application of vacuum circuit breaker technology from 145 kV to 245 kV and 420 kV.

The 245 kV level is the main battleground for the next phase of vacuum technology.

Vacuum high-voltage circuit breaker technology at 72.5/126/145 kV is relatively mature, but the 245/252 kV levels require solutions to issues such as vacuum gap insulation, large-sized vacuum arc chambers, temperature rise, and high-current breaking. Pinggao's 252 kV single-break vacuum circuit breaker has completed type testing, marking a significant milestone for this technology path.

The 420 kV market will continue to be dominated by a handful of international manufacturers in the short term

Hitachi Energy has launched its 420 kV EconiQ commercial product; GE Vernova is advancing its 420 kV g³ project; and Siemens Energy is moving forward with its 420 kV Clean Air+Vacuum GIS demonstration project. In other words, the 420 kV market is not one that ordinary high-voltage switchgear manufacturers can quickly enter; rather, it is characterized by market barriers consisting of technical certification, long-term operational records, and grid customer access.

Report Scope

This report is a detailed and comprehensive analysis for global Eco-friendly Circuit Breaker market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Eco-friendly Circuit Breaker market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (k USD/Units), 2021-2032

Global Eco-friendly Circuit Breaker market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (k USD/Units), 2021-2032

Global Eco-friendly Circuit Breaker market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (k USD/Units), 2021-2032

Global Eco-friendly Circuit Breaker market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (k USD/Units), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Eco-friendly Circuit Breaker
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Eco-friendly Circuit Breaker market based on the following parameters - company overview, sales quantity, revenue, price, gross

margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Hitachi Energy Ltd., GE Vernova Inc., Siemens Energy AG, HD Hyundai Electric Co., Ltd., Hyosung Heavy Industries Corporation, LS ELECTRIC Co., Ltd., Pinggao Electric Co., Ltd., Meidensha Corporation, China XD, TBEA, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Eco-friendly Circuit Breaker market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

170 kV Class

245 kV Class

420 kV Class

Market segment by Circuit Breaker Structure

Live Tank Circuit Breaker

Dead Tank Circuit Breaker

GIS Circuit Breaker

Hybrid/HGIS Circuit Breaker

Market segment by Sales Channels

Direct Sales

Distribution

Market segment by Application

Transmission Substations

Renewable Energy Grid Connection

Power Generation Facilities

Large Industrial Power Systems

Grid Interconnection and Expansion

Major players covered

Hitachi Energy Ltd.

GE Vernova Inc.

Siemens Energy AG

HD Hyundai Electric Co., Ltd.

Hyosung Heavy Industries Corporation

LS ELECTRIC Co., Ltd.

Pinggao Electric Co., Ltd.

Meidensha Corporation

China XD

TBEA

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Eco-friendly Circuit Breaker product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Eco-friendly Circuit Breaker, with price, sales quantity, revenue, and global market share of Eco-friendly Circuit Breaker from 2021 to 2026.

Chapter 3, the Eco-friendly Circuit Breaker competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Eco-friendly Circuit Breaker breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Eco-friendly Circuit Breaker market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Eco-friendly Circuit Breaker.

Chapter 14 and 15, to describe Eco-friendly Circuit Breaker sales channel, distributors, customers, research findings and conclusion.

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