

# Global No-load Tap Changer (NLTC/OCTC/DETC) Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G1E88E22FCA6EN.html>

Date: June 2026

Pages: 120

Price: US\$ 4,480.00 (Single User License)

ID: G1E88E22FCA6EN

## Abstracts

The global No-load Tap Changer (NLTC/OCTC/DETC) market size is expected to reach \$ 388 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

A No-load Tap Changer (or de-energized tap changer) is a mechanical switching device installed at the winding tap position of power transformers, distribution transformers, rectifier transformers, furnace transformers, traction transformers, and similar equipment. It is used to change the effective number of winding turns when the transformer is disconnected from the power supply and in a de-energized state, thereby adjusting the transformer voltage ratio and output voltage.

It does not perform load-current switching. In general, it is not equipped with the diverter switch, transition resistors, vacuum interrupters, or complex arc-extinguishing systems used in on-load tap changers. Therefore, its structure is relatively simple, its cost is lower, and its maintenance requirements are relatively light. However, it cannot be used for continuous voltage regulation while the transformer is in operation.

In terms of product form, it is usually installed inside the transformer tank, on the tank cover, or on the tank wall. Common structural types include drum-type, cage-type, disk-type, linear/bar-type, and cylindrical de-energized tap changers.

Tap changers are devices used to connect and switch transformer winding taps, and they are important components of transformers. They are mainly classified into on-load tap changers (OLTCs) and off-circuit/de-energized tap changers (OCTCs/DETCs).

From a product value perspective, an off-circuit tap changer is not merely a mechanical

gear-shifting device. Its core technical value lies in reliable contact performance, insulation coordination, mechanical positioning accuracy, short-circuit withstand capability, temperature-rise control, and long-term stability in transformer oil. In medium- and low-voltage applications and distribution transformers, three-phase integrated off-circuit tap changers are widely used due to their compact structure, lower cost, and high assembly efficiency. In high-voltage, high-current, special winding, and complex connection scenarios, single-phase, 1+2 combined, drum-type, cage-type, linear/bar-type, and cylindrical structures are better suited to meeting requirements related to internal transformer space, phase-to-phase insulation, and lead arrangement. MR's de-energized tap changer portfolio covers distribution transformers, extra-high-voltage grids, and special applications, and includes both linear and rotary designs. Hitachi Energy also provides bridging, linear, and rotary structures, with rated capabilities of up to 4,000 A and 1,050 kV BIL, indicating that this product has a clear engineering-customized nature across different voltage classes and application scenarios.

From a market structure perspective, the global tap changer industry is relatively concentrated. The leading players mainly include Maschinenfabrik Reinhausen (MR), Huaming Power Equipment, and Hitachi Energy (formerly ABB's power grids business). In the on-load tap changer segment, MR, Huaming Power Equipment, Hitachi Energy, Elprom, and CTR are among the key suppliers, with the top five companies accounting for a significant market share. Although the unit value of off-circuit tap changers is generally lower than that of on-load tap changers, demand for OCTCs grows alongside new transformer installations, replacement demand, and transformer export programs. As a result, it remains a stable, widely used, and customer-sticky niche segment within the transformer components market.

Looking ahead, the off-circuit tap changer market is expected to continue benefiting from global grid upgrades, distribution network renovation, renewable energy grid integration, industrial electricity demand growth, and rising transformer export demand. As transformers evolve toward higher reliability, compact design, lower maintenance requirements, and longer service life, customer requirements for off-circuit tap changers are also shifting from simple 'tap switching capability' to long-term stability, structural adaptability, ease of installation, and full life-cycle reliability.

This report studies the global No-load Tap Changer (NLTC/OCTC/DETC) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for No-load Tap Changer (NLTC/OCTC/DETC) and provides market size (US\$ million) and Year-

over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of No-load Tap Changer (NLTC/OCTC/DETC) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global No-load Tap Changer (NLTC/OCTC/DETC) total production and demand, 2021-2032, (Units)

Global No-load Tap Changer (NLTC/OCTC/DETC) total production value, 2021-2032, (USD Million)

Global No-load Tap Changer (NLTC/OCTC/DETC) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global No-load Tap Changer (NLTC/OCTC/DETC) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: No-load Tap Changer (NLTC/OCTC/DETC) domestic production, consumption, key domestic manufacturers and share

Global No-load Tap Changer (NLTC/OCTC/DETC) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global No-load Tap Changer (NLTC/OCTC/DETC) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global No-load Tap Changer (NLTC/OCTC/DETC) production by End User, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global No-load Tap Changer (NLTC/OCTC/DETC) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Maschinenfabrik Reinhausen (MR), Huaming Power Equipment, Hitachi Energy (ABB), Elprom Heavy Industries, CTR Manufacturing Industries, Quality Switch, Inc, Wuhan Taipu, Zhejiang Tenglong Electrical Apparatus, Liaoning Jinli Electric Power Electrical Appliance, China XD Group, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World No-load Tap Changer (NLTC/OCTC/DETC) market

### Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by End User. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

### Global No-load Tap Changer (NLTC/OCTC/DETC) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global No-load Tap Changer (NLTC/OCTC/DETC) Market, Segmentation by Type:

Strip Type DETC

Cage Type DETC

Disc Type DETC

### Global No-load Tap Changer (NLTC/OCTC/DETC) Market, Segmentation by Phase:

Single-phase DETC

1+2 Phase DETC

Three-phase DETC

Global No-load Tap Changer (NLTC/OCTC/DETC) Market, Segmentation by End User:

Distribution Transformer

Power Transformer

Others

Companies Profiled:

Maschinenfabrik Reinhausen (MR)

Huaming Power Equipment

Hitachi Energy (ABB)

Elprom Heavy Industries

CTR Manufacturing Industries

Quality Switch, Inc

Wuhan Taipu

Zhejiang Tenglong Electrical Apparatus

Liaoning Jinli Electric Power Electrical Appliance

China XD Group

Alwaye Load Selectors

Key Questions Answered:

1. How big is the global No-load Tap Changer (NLTC/OCTC/DETC) market?
2. What is the demand of the global No-load Tap Changer (NLTC/OCTC/DETC) market?
3. What is the year over year growth of the global No-load Tap Changer (NLTC/OCTC/DETC) market?
4. What is the production and production value of the global No-load Tap Changer (NLTC/OCTC/DETC) market?
5. Who are the key producers in the global No-load Tap Changer (NLTC/OCTC/DETC) market?
6. What are the growth factors driving the market demand?

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