

Global RIP Bushing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global RIP Bushing market size is expected to reach \$ 941 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

RIP Bushing refers to a dry-type high-voltage condenser bushing whose main insulation is formed by winding insulating paper and conductive grading layers around a central conductor or tube, followed by vacuum drying, epoxy-resin impregnation and curing to create a solid resin-impregnated paper core. The condenser grading structure controls the electric-field distribution between the energized conductor and grounded flange, while the external insulation is typically provided by silicone rubber, polymer composite or porcelain housings according to voltage class and operating environment. RIP Bushing is characterized by oil-free insulation, low partial discharge, low dielectric loss, strong mechanical performance, fire and explosion resistance, flexible transport and reduced maintenance requirements. The study covers commercially supplied RIP Bushing products for power transformers, oil-to-air, oil-to-oil and oil-to-gas connections, GIS interfaces, wall penetrations, generators, high-current applications and selected AC/DC transmission equipment, spanning conventional high-voltage through extra-high-voltage and ultra-high-voltage applications. Product design is typically adapted according to rated voltage, current, insulation interface, creepage distance, seismic requirement and equipment connection configuration.

Key Findings

Dry oil-free insulation and reduced maintenance are accelerating RIP Bushing adoption as an alternative to conventional OIP technology

Commercial RIP Bushing portfolios now extend from mainstream high-voltage applications to ultra-high-voltage systems approaching 1200 kV

Power transformers remain the core application while GIS, wall, generator and high-current configurations expand the addressable product range

Hitachi Energy introduced an 800 kV AirRIP Flex platform in 2026 for higher-voltage transformers using alternative insulating fluids

China and Europe form major manufacturing technology centers while India is increasing localized RIP Bushing production capacity

Market Trends

The RIP Bushing industry is moving toward higher voltage capability, dry insulation, composite external insulation and stronger compatibility with new grid architectures. Utilities and transformer OEMs increasingly value oil-free bushings because the solid insulation structure reduces leakage, fire and explosion risks and can simplify transportation and maintenance compared with conventional oil-impregnated designs. Silicone and polymer composite housings are gaining importance because of their lower weight, hydrophobicity, shatter resistance and seismic performance, although porcelain remains relevant in selected utility specifications. Another important direction is the extension of RIP Bushing technology into higher-voltage and more specialized interfaces. Trench Group currently offers RIP transformer bushings up to 1200 kV, while Hitachi Energy launched the AirRIP Flex AF 800 kV platform in 2026 and expanded RIP technology into dry cable-termination applications. Product development is also responding to SF₆ reduction, alternative transformer fluids, seismic requirements and replacement of aging OIP fleets, pushing suppliers toward more modular, application-specific and environmentally compatible designs.

Market Dynamics

Drivers

The primary demand driver is continued investment in transmission grids, substations and large power transformers as electricity consumption, renewable generation, electrification and interregional power transfer increase. Every new high-voltage

transformer, reactor, GIS connection or converter installation requires reliable insulated interfaces between energized conductors and grounded equipment, creating structural demand for high-voltage bushings. RIP Bushing benefits particularly from utilities' increasing focus on fire safety, explosion resistance, maintenance reduction and lifecycle reliability. Replacement demand is another important driver because aging OIP bushings can develop oil leakage, moisture ingress and insulation deterioration, making dry-type retrofit solutions attractive for extending transformer service life. Hitachi Energy, Moser-Glaser and other suppliers explicitly offer RIP products for replacement of existing oil-impregnated bushings, supporting a recurring aftermarket beyond new-equipment installations.

Restraints

RIP Bushing carries higher technical and qualification requirements than conventional lower-voltage bushing products. Manufacturing requires precision condenser-core winding, controlled vacuum drying, void-free resin impregnation, curing, machining and high-voltage testing, while defects introduced during production can create partial discharge or dielectric-loss problems that are difficult to correct after curing. Product dimensions are also closely linked to the transformer, GIS or wall interface, meaning replacement and new-build projects often require engineering customization rather than purely standardized catalogue products. At extra-high and ultra-high voltage, type testing, seismic verification, thermal performance and mechanical cantilever requirements increase development costs and qualification periods. Established OIP technology also remains competitive in certain high-current and ultra-high-voltage applications, limiting the speed at which RIP Bushing can replace traditional technology across the entire installed base.

Opportunities

A major market opportunity lies in replacing aging OIP bushings with maintenance-reduced dry products. Direct-replacement designs allow utilities to improve transformer safety without replacing the transformer itself, creating a substantial retrofit opportunity across mature power networks. Ultra-high-voltage transmission represents another high-value segment as suppliers extend RIP technology toward 800 kV and above. In China, TBEA has commercialized epoxy resin impregnated paper capacitive bushings for ultra-high-voltage AC and DC equipment and has supplied customized RIP DC bushings for major transmission projects. SF₆-free GIS and alternative insulating fluids create additional opportunities because bushing interfaces must be redesigned for new gas

pressures, dielectric conditions and transformer fluids. Hitachi Energy's GARIP Eco and AirRIP Flex developments demonstrate how existing RIP platforms are being adapted to these emerging grid requirements.

Challenges

The principal long-term challenge is ensuring consistent insulation performance over decades of field operation. The quality of paper drying, epoxy impregnation, condenser-layer positioning and moisture sealing directly influences partial discharge, dielectric loss and long-term aging. Ultra-high-voltage designs further increase sensitivity to electric-field distribution, thermal expansion, mechanical stress and seismic loading. Suppliers must therefore maintain sophisticated process control and high-voltage testing capabilities while adapting individual designs to transformer manufacturers and utilities worldwide. A second challenge comes from competing dry insulation technologies. Resin Impregnated Synthetic bushings replace cellulose paper with synthetic insulation and are increasingly commercialized for applications historically served by RIP. GE Vernova, for example, offers RIS transformer bushings up to 420 kV that are designed to be interchangeable with RIP products, while Hitachi Energy is developing paperless RIS platforms. RIP Bushing suppliers consequently need to improve moisture resistance, lifecycle performance, cost and voltage capability to defend their position within the broader dry-bushing market.

Industry Chain Analysis

The upstream industry chain of RIP Bushing consists of electrical-grade crepe paper or insulating paper, epoxy resin systems, conductive aluminum or carbon-based grading materials, copper or aluminum conductors, metal flanges, silicone rubber or porcelain external insulation, sealing materials, terminals and test taps. Material consistency is critical because paper moisture, resin viscosity, curing characteristics and conductive grading-layer accuracy directly influence the final dielectric performance. High-quality silicone rubber and composite housings also contribute to creepage performance, pollution resistance, seismic behavior and overall mechanical weight.

The midstream manufacturing process includes conductor preparation, precision winding of paper and condenser grading layers, vacuum drying, epoxy-resin impregnation, curing, machining, external-insulator assembly, terminal integration and electrical and mechanical testing. Value creation is concentrated in condenser-field

design, void-free impregnation, partial-discharge control, dielectric-loss management, thermal design, seismic engineering and application customization rather than simple component assembly. Downstream customers include transformer manufacturers, GIS and switchgear OEMs, generator manufacturers, transmission-system equipment suppliers and electric utilities. New-build transmission projects generate original-equipment demand, while replacement of aging bushings creates a significant aftermarket. Product profitability generally increases with voltage class, current rating, customization complexity, qualification requirements and specialized applications such as GIS, generator, HVDC and ultra-high-voltage systems.

Segment Insights

Transformer RIP Bushing represents the principal product area because power transformers require reliable high-voltage interfaces between internal windings, transformer oil and external transmission conductors. Oil-to-air designs form the broadest configuration, while oil-to-oil and oil-to-gas products serve cable boxes, enclosed conductors and GIS connections. Wall bushings, generator bushings and high-current bushings occupy smaller but technically differentiated segments where mechanical configuration, current-carrying capability and insulation interfaces vary considerably. GIS-related RIP products are gaining strategic importance as utilities move toward more compact substations and progressively introduce alternative gases to replace SF₆.

Voltage level strongly affects product value and competitive barriers. Products in conventional high-voltage ranges are supplied by a broader manufacturer base, while 420–550 kV and higher classes require more advanced condenser design, testing capability and proven field references. Ultra-high-voltage RIP Bushing products represent a specialized high-value segment dominated by suppliers capable of large-scale winding, precise field grading and full type testing. Trench Group's portfolio reaches 1200 kV, while Hitachi Energy, GE Vernova, Moser-Glaser, Izolyator, TBEA and selected Chinese manufacturers have established products or project references at extra-high and ultra-high voltage.

Downstream Market Opportunities

Large power transformers remain the most important downstream market for RIP Bushing, particularly in transmission substations, renewable-energy grid connections, interregional transmission corridors and transformer replacement programs. GIS

applications provide additional growth potential as dense urban substations, offshore power networks and high-voltage transmission projects require compact equipment interfaces, while the transition toward SF₆-free switchgear creates new bushing design requirements. Converter transformers and UHV transmission equipment represent smaller-volume but substantially higher-value opportunities because electrical, thermal and mechanical specifications are more demanding. Generator and high-current applications provide another specialized market where current-carrying capacity, low resistance and thermal management are more important than conventional transformer requirements. Retrofit programs for existing transformers are particularly attractive because utilities can improve safety and reduce oil-related maintenance without replacing major primary equipment.

Regional Insights

Europe remains one of the principal technology centers for RIP Bushing, supported by Hitachi Energy, Trench Group, MGC Moser-Glaser and PFISTERER and by a long history of condenser-bushing engineering. European suppliers have strong capabilities in dry insulation, extra-high-voltage applications, replacement products, GIS interfaces and specialized grid equipment. Moser-Glaser traces industrial development of epoxy resin impregnated paper technology to 1958, while current DURESCA transformer bushings extend to 550 kV. North America represents an important utility and replacement market, while GE Vernova maintains a broad RIP product portfolio for transformers and generators and operates its bushing manufacturing and competence center in Europe.

China has developed a substantial domestic RIP Bushing manufacturing base alongside rapid expansion of extra-high- and ultra-high-voltage grids. TBEA, Nanjing Electric High Voltage Bushing, ChinSun and Bushing (Beijing) HV Electric address transformer and specialized high-voltage applications, with TBEA demonstrating commercial application of epoxy resin impregnated paper capacitive bushings in major UHV transmission projects. India is developing local dry-bushing capabilities as transformer manufacturing and transmission investment expand. Yash Highvoltage offers RIP products up to 245 kV, has localized RIP/RIS manufacturing and initiated a dedicated RIP greenfield expansion project in 2025. Other emerging transmission markets in Asia, the Middle East and Africa provide opportunities for suppliers with proven high-voltage references and strong local qualification support.

Competitive Landscape Analysis

The RIP Bushing market is characterized by a relatively limited group of specialized high-voltage insulation manufacturers because condenser-core design, vacuum impregnation, high-voltage testing and long field references create significant entry barriers. Hitachi Energy and Trench Group possess broad portfolios covering transformer, wall, GIS and specialized high-voltage applications, with Trench extending its RIP transformer platform to 1200 kV and Hitachi Energy continuing to broaden the AirRIP architecture. GE Vernova maintains established RIP transformer and generator products up to 550 kV for transformer applications, while MGC Moser-Glaser combines long RIP technology experience with DURESCA products extending to 550 kV. Izolyator has established an important position in extra-high-voltage applications and completed installation of an 800 kV RIP replacement bushing in India in 2025. In China, CHINA XD ELECTRIC CO., LTD., Shenyang Hexin Bushing Co., Ltd., Shandong ChinSun Electrical Equipment Co., Ltd. and Bushing (Beijing) HV Electric Co., Ltd. provide a growing domestic manufacturing base for high-voltage and UHV applications. Yash Highvoltage represents an expanding Indian participant, while PFISTERER addresses specialized pluggable RIP interfaces. Competition increasingly depends on voltage capability, installed references, partial-discharge and dielectric-loss performance, customized replacement capability, seismic performance, delivery lead time and compatibility with emerging SF₆-free and alternative-fluid grid equipment rather than simply on manufacturing capacity.

Report Scope

This report studies the global RIP Bushing production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for RIP Bushing 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 RIP Bushing that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global RIP Bushing total production and demand, 2021-2032, (K Units)

Global RIP Bushing Supply, Demand and Key Producers, 2026-2032

Global RIP Bushing total production value, 2021-2032, (USD Million)

Global RIP Bushing production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global RIP Bushing consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: RIP Bushing domestic production, consumption, key domestic manufacturers and share

Global RIP Bushing production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global RIP Bushing production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global RIP Bushing production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global RIP Bushing 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 Hitachi Energy Ltd., Trench Group GmbH, GE Vernova Inc., CHINA XD ELECTRIC CO.,LTD., Massa LLC, Shenyang Hexin Bushing Co., Ltd., MGC Moser Glaser Ltd, Shandong ChinSun Electrical Equipment Co., Ltd., Yash Highvoltage Limited, Bushing (Beijing) HV Electric Co., Ltd., 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 RIP Bushing market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. 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 RIP Bushing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global RIP Bushing Market, Segmentation by Type:

Oil-to-Air RIP Bushings

Oil-to-SF6 RIP Bushings

Oil-to-Oil RIP Bushings

Air-to-Air RIP Bushings

Global RIP Bushing Market, Segmentation by Rated Voltage Types:

Up to 72.5 kV

73–245 kV

245.5–550 kV

>550 kV

Global RIP Bushing Market, Segmentation by External Insulation Structure Types:

Composite-Housed RIP Bushings

Porcelain-Housed RIP Bushings

Global RIP Bushing Market, Segmentation by Application:

Power Transformers and Reactors

Gas-Insulated Switchgear and Gas-Insulated Lines

Generator and High-Current Power Connections

Wall and Building Feedthroughs

Others

Companies Profiled:

Hitachi Energy Ltd.

Trench Group GmbH

GE Vernova Inc.

CHINA XD ELECTRIC CO.,LTD.

Massa LLC

Shenyang Hexin Bushing Co., Ltd.

MGC Moser Glaser Ltd

Shandong ChinSun Electrical Equipment Co., Ltd.

Yash Highvoltage Limited

Bushing (Beijing) HV Electric Co., Ltd.

PCORE Electric Company, Inc.

Nanjing Electric High Voltage Bushing Co., Ltd.

Massa Izolyator Mehru Private Limited

CG Power and Industrial Solutions Limited

Key Questions Answered

1. How big is the global RIP Bushing market?
2. What is the demand of the global RIP Bushing market?
3. What is the year over year growth of the global RIP Bushing market?
4. What is the total value of the global RIP Bushing market?
5. Who are the Major Players in the global RIP Bushing market?
6. What are the growth factors driving the market demand?

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