

Global Surge Arresters Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Surge Arresters market size is expected to reach \$ 2463 million by 2032, rising at a market growth of 4.3% CAGR during the forecast period (2026-2032).

Surge arrester is an important overvoltage protection device used to limit lightning overvoltage and switching overvoltage and to protect the insulation safety of electrical equipment. It is typically connected in parallel in power systems. When abnormal overvoltage occurs, it rapidly conducts to discharge surge energy and returns to a high-resistance state after the overvoltage disappears, thereby limiting the voltage borne by the equipment within an allowable range. The product is widely used in transmission lines, substations, distribution networks, rail transit, power electronics, and new energy power systems, and serves as an essential component for ensuring the safe and stable operation of power grids and the reliable operation of critical electrical equipment. In 2025, global surge arrester output reached 35.83 million units, with an average selling price of USD 50 per unit.

The surge arrester industry is an important segment within the power transmission and distribution equipment system, mainly used to limit lightning overvoltage and switching overvoltage and to protect the insulation safety of key electrical equipment such as transformers, GIS, line insulation systems, converter station equipment, and railway traction power supply systems. Industry demand is closely related to the intensity of grid investment, distribution network upgrades, renewable energy grid connection, equipment replacement and modernization, and railway construction. In recent years, driven by the development of new-type power systems, the improvement of distributed renewable energy access capability, and the replacement cycle of aging equipment, the industry has maintained a steady upward trend, with prosperity clearly outperforming the traditional single-cycle grid-support market. From a regional perspective, China is

one of the most important manufacturing and application markets for surge arresters globally, supported by a complete supporting system covering zinc oxide resistor blocks, polymer housings, metal fittings, final assembly, and testing. European and Japanese companies still maintain strong influence in high-end railway applications, GIS, selected high-voltage products, and global certification systems. In terms of product structure, nearly all newly added market demand is now dominated by metal-oxide surge arresters, with gapless metal-oxide surge arresters occupying the core position, while internally gapped products and externally gapped line products have also developed further. In terms of application structure, surge arresters have expanded from traditional transmission lines, substations, and distribution networks into railway traction power supply, DC systems, GIS, transformers, cable systems, and renewable energy power applications, with application boundaries continuing to broaden. From the perspective of industry chain and cost structure, upstream mainly includes zinc oxide, bismuth oxide, cobalt oxide, methyl vinyl silicone rubber, copper, stainless steel, flanges, and other metal and chemical materials. Midstream core processes include resistor block formulation design and sintering, polymer housing molding, porcelain housing or GIS tank-type structure manufacturing, final assembly, and type testing as well as routine testing. Downstream customers are mainly concentrated in State Grid, China Southern Power Grid, railway transit systems, power engineering EPC contractors, and overseas utility customers. In the industry cost structure, resistor block material systems, silicone rubber external insulation systems, and metal connecting parts are the main cost components. Resistor block performance, external insulation reliability, and overall product consistency determine a company's product grade and profitability. On the manufacturing side, the annual capacity of a standard surge arrester production line is typically 150,000-200,000 units, while newly added capacity in large-scale expansion projects is usually 500,000-700,000 units per year. The total capacity of mature production bases can exceed one million units, and the industry has formed a pattern in which standardized mass production coexists with high-end project-based manufacturing. In terms of profitability and competitive landscape, the surge arrester industry is characterized by fragmentation in the low- and mid-end segments and concentration in the high-end segment. The average gross margin of conventional products is generally in the range of 35%-40%, while high-end products used in UHV, railway, GIS, and specialized applications usually achieve significantly higher gross margins. The industry's average gross margin is around 38%, and the gross margin of head companies on UHV projects can reach 55%-65%. In terms of competition, there are many participants in conventional medium- and low-voltage as well as distribution network products, where price competition is relatively intense. In contrast, in high-barrier fields such as EHV/UHV, railway traction power supply, GIS tank-type products, and DC converter applications, market resources are mainly concentrated in a limited

number of companies with independent resistor block R&D capability, full-voltage product portfolios, strong testing and validation capability, and long-term project track records, with industry concentration continuing to rise toward leading players. Looking ahead, the surge arrester industry will continue to upgrade along the directions of polymer housing substitution, GIS and compact design, miniaturization, coordinated optimization of high energy absorption and low residual voltage, expansion in DC systems and renewable energy applications, deeper penetration into railway and overseas markets, and enhanced online monitoring and condition assessment. As the construction of new-type power systems advances, distribution network hosting capacity improves, and the requirements for coordinated source-grid-load-storage operation increase, the industry will place higher demands on product reliability, long service life, pollution resistance, aging resistance, and digital monitoring capability. Companies with core resistor block material capability, polymer housing process capability, integrated testing platforms, and overseas certification foundations will hold stronger competitive advantages in the future.

This report studies the global Surge Arresters production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Surge Arresters total production and demand, 2021-2032, (K Units)

Global Surge Arresters total production value, 2021-2032, (USD Million)

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

Global Surge Arresters consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Surge Arresters domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Surge Arresters 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, Siemens, Hubbell, Eaton, TOSHIBA, Meidensha, Streamer, Lamco Industries, Shreem Electric, Ensto, 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 Surge Arresters market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (USD/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 Surge Arresters Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Surge Arresters Market, Segmentation by Type:

Below 35 kV

35-110 kV

Above 110 kV

Global Surge Arresters Market, Segmentation by Housing/External Insulation Type:

Polymeric-Housed Surge Arrester

Porcelain-Housed Surge Arrester

Global Surge Arresters Market, Segmentation by Application:

Transmission Line

Substation

Distribution Line

Others

Companies Profiled:

Hitachi Energy

Siemens

Hubbell

Eaton

TOSHIBA

Meidensha

Streamer

Lamco Industries

Shreem Electric

Ensto

GE Vernova company

Mitsubishi Electric Corporation

CG Power & Industrial Solutions

Jingguan

China XD

Fushun Electric Porcelain Electrical Appliance

HENGDA ELECTRIC

Henan Pinggao Electric

FVA Electric Apparatus

Yikun Electric

Nanyang Jinniu Electric

Key Questions Answered:

1. How big is the global Surge Arresters market?
2. What is the demand of the global Surge Arresters market?
3. What is the year over year growth of the global Surge Arresters market?
4. What is the production and production value of the global Surge Arresters market?
5. Who are the key producers in the global Surge Arresters market?

6. What are the growth factors driving the market demand?

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