

Global Lightning Arrester Market Growth 2026-2032

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Abstracts

The global Lightning Arrester market size is predicted to grow from US\$ 1753 million in 2025 to US\$ 2378 million in 2032; it is expected to grow at a CAGR of 4.5% from 2026 to 2032.

Lightning Arrester refers to an overvoltage protection device used to limit lightning-induced overvoltage and switching overvoltage and to protect the insulation safety of electrical equipment. It is typically installed in parallel in power systems and rapidly conducts surge current when abnormal overvoltage occurs, then returns to a high-resistance state after the surge has passed, thereby restricting the voltage on protected equipment within an acceptable range. Lightning arresters are widely used in transmission lines, substations, distribution networks, railway power supply systems, and renewable energy power systems, and are essential components for ensuring the safe and reliable operation of power grids and critical electrical equipment. In 2025, global lightning arrester output reached 35.83 million units, with an average selling price of USD 50 per unit.

The Lightning Arrester industry is one of the most important overvoltage protection segments in power transmission, distribution, and railway electrical systems. Its products are mainly used to limit lightning overvoltage and switching overvoltage and to protect the insulation safety of key equipment such as transformers, GIS, line insulation systems, converter valves, and traction power supply systems. In recent years, industry momentum has strengthened significantly. Over a longer cycle, global grid investment has also entered an expansion phase, and the continuous increase in investment in main grid construction, distribution network upgrading, renewable energy grid integration, and aging equipment replacement is expected to provide sustained support for the development of the Lightning Arrester industry in the coming years.

From a regional perspective, China is one of the most important manufacturing and

application markets for Lightning Arresters, supported by a complete supporting system covering zinc oxide materials, composite external insulation, metal fittings, and complete-product manufacturing. China has clear manufacturing advantages in conventional medium- and low-voltage as well as medium- and high-voltage products. In the high-end segment, leading domestic companies have already developed supply capability for 1000 kV AC and DC ultra-high-voltage products, while European and Japanese companies still maintain strong influence in GIS, railway applications, selected overseas high-end projects, and global certification systems. In terms of product structure, the industry is now almost entirely dominated by metal-oxide Lightning Arresters, while silicon carbide valve-type products have already exited the mainstream market for new installations. By structure, products can be divided into gapless metal-oxide Lightning Arresters, internally gapped metal-oxide Lightning Arresters, and externally gapped metal-oxide Lightning Arresters, among which gapless products are the absolute mainstream. By application, the industry mainly covers transmission lines, substations, distribution networks, railway traction power supply, DC converter stations, and GIS protection scenarios, and products have gradually expanded from AC systems to DC systems, railway applications, and other specialized overvoltage protection scenarios.

From the perspective of industry chain and cost structure, the upstream of the Lightning Arrester industry mainly includes raw materials such as zinc oxide, bismuth oxide, cobalt oxide, silicone rubber, copper, metal plates, flanges, other hardware components, porcelain housings, and composite housings. Midstream core manufacturing processes include resistor block formulation and sintering, external insulation component molding, final assembly, type testing, and routine testing. Among these, resistor blocks are the core components that determine surge current capability, residual voltage, aging performance, and electric field gradient control capability. Downstream customers are mainly concentrated in State Grid, China Southern Power Grid, railway vehicle and operation systems, industrial users, overseas power utilities, and EPC customers. Within the cost structure, functional materials as well as external insulation and metal fitting systems account for a relatively high proportion, and corporate profitability depends to a large extent on resistor block formulation capability, silicone rubber processing capability, overall product consistency control, and project certification capability rather than on simple assembly alone.

From the manufacturing perspective, the Lightning Arrester industry includes both standardized mass-produced products and highly project-based, customized products. Single-line capacity varies significantly depending on voltage class, testing capability, and product structure. Based on disclosed projects by representative domestic

companies, newly added Lightning Arrester project capacity can reach 700,000 units, while the approved total capacity of mature factories can reach 2 million units. Accordingly, the annual capacity of a conventional automated production line is typically 500,000 to 700,000 units. If production is mainly focused on ultra-high-voltage, DC, GIS, or high-reliability railway products, the converted single-line capacity will be lower than this level. In terms of profitability, the gross margin of conventional Lightning Arrester products has in recent years mostly been in the range of 35% to 40%, while the profitability of ultra-high-voltage project-based products is significantly higher. Based on this, the overall average gross margin of the industry can be considered to be around 38%, and the gross margin of high-end ultra-high-voltage and specialized application products is clearly above the industry average.

From the perspective of competitive landscape and future development trends, the Lightning Arrester industry as a whole is characterized by fragmentation in the low- and mid-end segments and concentration in the high-end segment. Among the 133 insulator and Lightning Arrester enterprises included in industry statistics in 2024, only 39 companies recorded output value above RMB 200 million, yet these companies accounted for more than 70% of the total output value, indicating that industry concentration is continuing to rise toward leading players. In the ultra-high-voltage segment, companies capable of supplying 1000 kV AC gapless metal-oxide Lightning Arresters are mainly concentrated in a limited number of manufacturers such as Jinguan Electric, XD Group, Pinggao Toshiba, and Fushun Insulator. Over the next five years, the industry is expected to continue upgrading along the directions of composite housing substitution, GIS and compact applications, high-energy absorption and low-residual-voltage design, expansion in DC and renewable energy scenarios, deeper penetration into railway and overseas markets, and stronger integration of online monitoring and condition assessment. At the same time, both technical barriers and certification barriers will continue to rise, and companies with independent resistor block R&D capability, complete testing platforms, and proven project delivery experience will be more likely to secure higher-value opportunities.

LP Information, Inc. (LPI) ' newest research report, the "Lightning Arrester Industry Forecast" looks at past sales and reviews total world Lightning Arrester sales in 2025, providing a comprehensive analysis by region and market sector of projected Lightning Arrester sales for 2026 through 2032. With Lightning Arrester sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Lightning Arrester industry.

This Insight Report provides a comprehensive analysis of the global Lightning Arrester

landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Lightning Arrester portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Lightning Arrester market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Lightning Arrester and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Lightning Arrester.

This report presents a comprehensive overview, market shares, and growth opportunities of Lightning Arrester market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Below 35 KV

35-110 KV

Above 110 KV

Segmentation by Housing/External Insulation Type:

Polymeric-Housed Surge Arrester

Porcelain-Housed Surge Arrester

Segmentation by Structure:

Gapless MO Surge Arrester

Internally Gapped MO Surge Arrester

Externally Gapped MO Surge Arrester

Segmentation by Application:

Transmission Line

Substation

Distribution Line

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Lightning Arrester market?

What factors are driving Lightning Arrester market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Lightning Arrester market opportunities vary by end market size?

How does Lightning Arrester break out by Type, by Application?

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