

Global Surge Arresters Market Growth 2026-2032

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Abstracts

The global Surge Arresters 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.

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.

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

This Insight Report provides a comprehensive analysis of the global Surge Arresters 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 Surge Arresters portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Surge Arresters market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Surge Arresters 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 Surge Arresters.

This report presents a comprehensive overview, market shares, and growth opportunities of Surge Arresters 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 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 Surge Arresters market?

What factors are driving Surge Arresters market growth, globally and by region?

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

How do Surge Arresters market opportunities vary by end market size?

How does Surge Arresters break out by Type, by Application?

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