

AC Circuit Breaker Market by Insulation Type (Air, Gas, Vacuum), Voltage (Medium, High, Very-high), Installation (Indoor, Outdoor), End-Use Industry (Transmission & Distribution Utilities, Power Generation, Industrial) & Region - Global Forecast to 2028

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Abstracts

The global ac circuit breaker market is estimated to grow from USD 5.3 billion by 2028 from an estimated of USD 4.1 billion in 2023; it is expected to record a CAGR of 5.3% during the forecast period. Increased investment in industrial production is driving the demand of ac circuit breaker market.

“T&D Utilities: The largest- growing segment of the AC circuit breaker market”

Based on by application of AC circuit breaker , the industrial type segment is estimated to be the largest-growing market from 2023 to 2028. The increase in demand for electric power has led to increased investments in transmission and distribution infrastructures. The modern sub-station is the hub for data; therefore, filtering, analyzing, and responding to the data is critical. Hence, companies are now focusing on integrating solutions for smart utilities, which would enhance protection by decreasing energy losses due to the poor operational efficiency of traditional equipment. The use of sensors in AC circuit breakers helps in power quality measurements, fewer interruptions, the protection of secondary equipment, easy and safe maintenance, remote monitoring and control, and less use of highly valuable raw materials. T&D is the largest growing end-user segment in the global AC circuit breaker market due to the replacement of aging infrastructure in power utilities and the increasing electricity demand.

“Air-insulated: The third-largest segment by insulation type in AC circuit breaker market”

The air segment, by insulation type, is projected to hold the third-largest market size during the forecast period. An air AC circuit breaker is used to provide overcurrent and short circuit protection for electric circuits. Air AC circuit breakers are usually used in low- and medium-voltage applications. They are commonly deployed at places where the normal operating current ranges up to a few hundred amperes. When circuits working on such high currents are disconnected, an electric arc is formed between the disconnecting ends due to the air ionization around the terminals. This arc formation is harmful to the circuit as well as the terminals under operation. So, to extinguish this arc in minimum time, an arc quenching medium is required. In this case, the medium is air, which blows through the middle of the terminals quenching the arc.

“Very-high Voltage: The third-largest segment by type in AC circuit breaker market”

The air-insulated segment, by type, is projected to hold the second largest market size during the forecast period. The European air-insulated AC circuit breaker market is projected to grow from USD 554 million in 2022 to USD 726 million by 2028; it is expected to grow at a CAGR of 4.7% from 2023 to 2028.

Faulty tripping and switching operations of very high-voltage circuits are very rare; most times, these circuit breakers remain in ON condition and may be operated after long periods. The switchgear systems in this voltage range are also used in renewable power transmission and medium-voltage substations. The growing electrification and the integration of renewables in the national grid require rapid upgrade of transmission and distribution infrastructure. Automated and smart AC circuit breakers are used with smart grid technology to enhance efficiency. Hence, the demand for very high-voltage AC circuit breakers is expected to swell during the forecast period.

“North America: The second fastest and third largest-growing region in AC circuit breaker market”

North America is estimated to hold the third largest and second fastest market share in the AC circuit breaker market. North America is segmented into US, Canada, and Mexico. The AC circuit breaker market in North America has experienced consistent growth due to several contributing factors. One significant factor is the rising need for dependable and effective electrical distribution systems across residential, commercial,

and industrial sectors. The demand for secure and reliable electrical infrastructure, combined with strict regulations and standards, has resulted in the widespread acceptance and utilization of circuit breakers. With the ongoing growth of the construction industry, fuelled by urbanization and population expansion, the demand for circuit breakers in residential applications is anticipated to increase. Similarly, the commercial and industrial sectors make substantial contributions to the circuit breaker market in North America. These sectors necessitate robust electrical systems to support diverse operations, including office buildings, retail spaces, manufacturing facilities, and data centres..

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 35%, Tier 2- 45%, and Tier 3- 20%

By Designation: C-Level- 35%, Director Levels- 25%, and Others- 40%

By Region: North America- 40%, Asia Pacific- 30%, Europe- 20%, the Middle East & Africa- 5%, and South America- 5%

Note: Others include product engineers, product specialists, and engineering leads.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2021. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: The AC circuit breaker market is dominated by a few major players that have a wide regional presence. The leading players in the AC circuit breaker market are Eaton (Ireland), ABB (Switzerland), Schneider Electric (France), Siemens (Germany), and Mitsubishi Electric (Japan).

Research Coverage:

The report defines, describes, and forecasts the global AC circuit breaker market, by voltage, insulation type, installation, end-use industry, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a

comprehensive review of the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market estimates, in terms of value and volume, and future trends in the AC circuit breaker market.

Key Benefits of Buying the Report

The report will help the leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the relay market and provides them information on key market drivers, restraints, challenges, and opportunities.

Analysis of key drivers (growing investments in power generation from renewable energy sources, increasing capacity additions and enhancements for t&d networks, strengthening of power distribution infrastructure, increased investments in industrial production), restraints (regulations restricting SF6 gas emissions, competition from unorganized sector), opportunities (emerging smart technologies and digitalization, growing usage of high-voltage direct current systems, replacement of aging grid infrastructure and need for reliable T&D networks), and challenges (risk of cybersecurity attacks and installation of modernized circuit breakers, high temperature, arc flashing, and overpressure during operation) influencing the growth of the ac circuit breaker market.

Product Development/ Innovation: The future of the ac circuit breaker market looks bright. Companies like Mitsubishi Electric announced the acquisition of Scibreak AB. Mitsubishi Electric announced that it entered into an acquisition on February 16 to wholly acquire Scibreak AB, a Swedish company that develops DC circuit breakers (DCCBs). The two firms aim to strengthen the competitiveness of their unified business by working closely on developing DCCB technologies for high-voltage direct current (HVDC) systems to support the increasing global deployment of renewable energy.

Market Development: The progress in rising power distribution networks is due to the rising per capita income, growing middle-class population, expanding urbanization, and increasing access to electricity in remotely located areas. Rural electrification in some developing countries is expected to bypass large

national grids in favor of distributed power generation. For instance, the Indian Government is focusing on increasing the penetration of power supply in villages with the help of schemes such as the Restructured Accelerated Power Development and Reforms Program (R-APDRP) and Deendayal Upadhyaya Gram Jyoti Yojana (DDUGJY). These schemes are providing an excellent opportunity for the AC circuit breaker market.

Market Diversification: Mitsubishi Electric offers technologically integrated products and mainly focuses on high-voltage circuit breakers. The company's 160 kV high-voltage DC circuit breaker prototype has passed the DC interruption test in a research project that was carried out by the European Commission. It also focuses on investments and expansion as one of its key strategies to increase market presence.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Eaton (Ireland), ABB (Switzerland), Schneider Electric (France), Siemens (Germany), and Mitsubishi Electric (Japan) among others in the ac circuit breaker market

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*Details on Business Overview, Products & Services, Key Insights, Recent Developments, SWOT Analysis, MnM View might not be captured in case of unlisted companies.

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