

Circuit Breaker Market by Insulation Type (Vacuum, Air, Gas, & Oil), Voltage (Medium, High), Installation (Indoor, Outdoor), End-User (Transmission & Distribution Utilities, Power Generation, Renewables, & Railways) and Region - Global Forecast to 2028

<https://marketpublishers.com/r/C9544A91E86EN.html>

Date: July 2023

Pages: 259

Price: US\$ 4,950.00 (Single User License)

ID: C9544A91E86EN

Abstracts

The circuit breaker market is expected to experience significant growth, with its size expanding from approximately USD 6.5 billion in 2023 to about USD 8.6 billion by 2028. This represents a compound annual growth rate (CAGR) of 5.5% during the forecast period from 2023 to 2028. Several factors are driving this growth, including the increasing investments in power generation, particularly in renewable energy sources. There is also a growing global demand for dependable and secure power supply, leading to the expansion and improvement of transmission and distribution networks. Furthermore, the railway sector is witnessing accelerated investments, further contributing to the growth of the circuit breaker market.

“The gas circuit breaker segment is expected to hold the largest share of the circuit breaker market, by insulation type, during the forecast period.”

During the projected timeframe, the gas circuit breakers segment is expected to dominate the circuit breaker market. This dominance is attributed to the favorable characteristics of gas circuit breakers, such as their high dielectric property and space-saving benefits. The Asia Pacific region is anticipated to hold the largest market share for gas circuit breakers, closely followed by Europe. The growing investments in renewable energy sources in these regions are driving the demand for upgrades to existing substations or the installation of new ones, specifically in SF6-based gas-insulated switchgear, thus stimulating the market for gas circuit breakers.

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

The industrial segment is expected to exhibit the highest growth rate in the circuit breaker market from 2023 to 2028, based on its application. The rising demand for electrical power has resulted in increased investments in transmission and distribution infrastructure. Modern substations serve as data hubs, necessitating the efficient filtering, analysis, and response to the data. Consequently, companies are focusing on integrating smart utility solutions to enhance protection and reduce energy losses caused by inefficient traditional equipment operation. The integration of sensors in circuit breakers offers several benefits, including power quality measurements, reduced interruptions, protection of secondary equipment, simplified and safe maintenance, remote monitoring and control, and minimized use of valuable raw materials. Among the end-user segments, the transmission and distribution (T&D) sector is experiencing the highest growth rate in the global circuit breaker market. This can be attributed to the replacement of aging infrastructure in power utilities and the growing demand for electricity.

“Asia Pacific: The fastest-growing market for circuit breaker.”

The Asia Pacific region is experiencing rapid growth in the circuit breaker market, followed by Europe and North America. This growth can be attributed to the increasing expansion of transmission and distribution networks and industrialization projects in countries such as China, Japan, and South Korea. For example, the State Grid Corporation of China (SGCC) has outlined plans to invest USD 250 billion in upgrading electric power infrastructure, with USD 45 billion allocated specifically for smart grids between 2018 and 2020. Similarly, Korea Electric Power Corp. (KEPCO) in South Korea has planned a USD 7.18 billion investment for the development of a nationwide smart grid infrastructure by 2030. These substantial investments are expected to drive the demand for circuit breakers in the Asia Pacific region.

Breakdown of Primaries:

Primary interviews were conducted with a diverse range of key industry participants, subject-matter experts, C-level executives from key market players, industry consultants, and other relevant experts. These interviews were carried out to gather and verify crucial qualitative and quantitative information, as well as to evaluate the future prospects of the market. The distribution of these primary interviews is as follows:

By Company Type: Tier 1- 65%, Tier 2- 24%, Tier 3- 11%

By Designation: C-Level- 30%, D-Level- 25%, Others- 45%

By Region: North America- 27%, Europe- 20%, Asia Pacific- 33%, Middle East & Africa- 8%, , and South America- 12%

Note: The tier of the companies has been defined based on their total revenue; as of 2017: Tier 1 = \$\$\$\$USD 5 billion, Tier 2 = USD 1 billion to USD 5 billion, and Tier 3 = \$\$\$USD 1 billion.

The key players in the circuit breaker market include companies such as ABB (Switzerland), Schneider Electric (France), Siemens (Germany), Mitsubishi Electric (Japan), and Eaton (Ireland).

Research Coverage:

The report offers a comprehensive overview of the circuit breaker market, covering various regions. Its objective is to estimate the market size and assess the potential for future growth across different segments, including insulation type, voltage, installation, end user, and region. Additionally, the report includes a detailed competitive analysis of key players in the market, featuring their company profiles, recent developments, and key market strategies. The market has been segmented based on insulation type, voltage, installation, end user, and region, with a focus on analyzing industry trends. The report also provides market share analysis of the top players, supply chain analysis, and company profiles, collectively providing insights into the competitive landscape and emerging high-growth segments within the circuit breaker market.

Key Benefits of Buying the Report

The report is designed to assist leaders and new entrants in the circuit breaker market by providing them with reliable revenue estimates for the overall market as well as its sub-segments. This information will enable stakeholders to understand the competitive landscape and gain valuable insights to effectively position their businesses and develop suitable go-to-market strategies. Furthermore, the report helps stakeholders comprehend the current state of the market and provides key information on market drivers, restraints, challenges, and opportunities. By understanding these factors, stakeholders can make informed decisions and stay attuned to market dynamics in the circuit breaker industry.

Analysis of key drivers (increasing investments in renewable energy-based power generation, expanding t&d network capacity additions and improvements, fortifying the infrastructure for power distribution, more money being invested in industrial production), restraints (regulations that limit the emissions of SF6 gas and competition from the unorganised sector), opportunities (Increasing use of high-voltage direct current systems, the digitalization of emerging smart technologies, the need to replace ageing grid infrastructure, and the requirement for dependable T&D networks are all factors), and challenges (High temperature, arc flashing, and overpressure during operation are risks, as is the installation of modernised circuit breakers) influencing the growth of the ac circuit breaker market.

Product Development/ Innovation: The circuit breaker market is poised for a promising future, as evidenced by recent developments such as Mitsubishi Electric's acquisition of Scibreak AB. On February 16, Mitsubishi Electric announced its complete acquisition of Scibreak AB, a Swedish company specializing in the development of DC circuit breakers (DCCBs). This strategic move aims to enhance the competitiveness of both companies by fostering close collaboration in the advancement of DCCB technologies for high-voltage direct current (HVDC) systems. This joint effort aligns with the growing global deployment of renewable energy sources and underscores the industry's commitment to supporting the expansion of HVDC systems.

Market Development: The expansion of power distribution networks can be attributed to several factors, including the rise in per capita income, the growth of the middle-class population, increasing urbanization, and improved access to electricity in remote areas. In some developing countries, rural electrification initiatives are prioritizing distributed power generation over reliance on large national grids. For example, the Indian Government is actively working towards enhancing power supply in villages through initiatives like the Restructured Accelerated Power Development and Reforms Program (R-APDRP) and the Deendayal Upadhyaya Gram Jyoti Yojana (DDUGJY). These schemes present significant opportunities for the circuit breaker market to contribute to the development of robust and reliable power infrastructure.

Market Diversification: Mitsubishi Electric specializes in offering technologically advanced and integrated products, with a particular emphasis on high-voltage circuit breakers. Recently, the company achieved a significant milestone as its 160 KV high-voltage circuit breaker prototype successfully passed the DC

interruption test conducted as part of a research project by the European Commission. This achievement highlights Mitsubishi Electric's commitment to innovation and its ability to deliver reliable solutions in the field of circuit breakers. Furthermore, the company places a strong focus on investments and expansion as key strategies to enhance its market presence. By investing in research and development, Mitsubishi Electric aims to stay at the forefront of technological advancements in the circuit breaker industry. Additionally, the company's expansion efforts aim to penetrate new markets and strengthen its global footprint, further solidifying its position in the market.

Competitive Assessment: A comprehensive evaluation has been conducted to analyze the market shares, growth strategies, and service offerings of prominent players in the circuit breaker market, including Eaton (Ireland), ABB (Switzerland), Schneider Electric (France), Siemens (Germany), and Mitsubishi Electric (Japan), among others. The assessment provides in-depth insights into the market position of these key players, their strategies for driving growth, and the range of services they offer in the circuit breaker segment.

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*Details on Business overview, Products/solutions/services offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

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