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Laminated Busbar Market by Material (Copper, Aluminum) End-User (Utilities, Industrial, Commercial, Residential) Insulation Material (Epoxy Powder Coating, Polyester Film, PVF Film, Polyester Resin, Heat-Resistant Fiber) Region - Global Forecast to 2030

https://marketpublishers.com/r/LBC5C0A2B66EN.html
Date: January 2024
Pages: 184
Price: US$ 4,950.00 (Single User License)
ID: LBC5C0A2B66EN

Abstracts

The global market for laminated busbar is expected to reach USD 1,296 million by 2030, a notable increase from the estimated USD 863 million in 2023, with a steady CAGR of 6.0% spanning the period from 2023 to 2030. One of the primary objectives of any electrical distribution system is to deliver high-quality and uninterrupted energy to consumers. The escalating demand for energy emphasizes the necessity for a stable and reliable transmission & distribution network globally. Given that many electrical distribution systems worldwide are aging, several countries, including the US and the UK, are investing in the modernization of their transmission & distribution infrastructure to establish a dependable supply network. As per the US Department of Energy (DOE), achieving a safe and secure electrical distribution system requires an investment ranging from USD 1.5 to 2 trillion between 2017 and 2030. To ensure the safety of distribution systems in the US, the electric power industry has developed voluntary standards, ensuring the coordination of various electrical distribution systems. Presently, mandatory reliability standards are in place for operating power systems and addressing security concerns at critical electrical infrastructure. For example, in North America, the North American Electric Reliability Corporation and its member organizations have formulated and enforced these standards, which receive approval from the Federal Energy Regulatory Commission in the US and Canadian regulators in Canada.

Laminated busbars play a crucial role in safeguarding electricity distribution systems by offering high heat resistance and applicability in high fire-risk environments. They

contribute to minimizing equipment failure rates by eliminating wiring errors and protecting the electrical system when overused equipment is at the brink of failure, averting potential dangerous explosions. This, in turn, enhances productivity and optimizes power distribution systems.

“Epoxy powder coating segment, by insulation material, to be the largest market from 2023 to 2030.”

In 2022, the epoxy powder coating segment constituted a 37.8% share of the laminated busbar market in terms of insulation material. This segment is anticipated to retain its position as the largest in the laminated busbar market by insulation material throughout the forecast period. Epoxy powder coating, characterized by its free-flowing nature and thermosetting dry powder composition, boasts high dielectric strength. Renowned for exceptional adhesion, chemical and heat resistance, superior mechanical properties, and electrical insulating capabilities, epoxy powder coating stands out as a cost-effective option compared to other insulation materials. Laminated busbars coated with epoxy powder find predominant usage in switchgear and motor drive applications. These favorable properties contribute to the growing preference for epoxy powder-coated laminated busbars among end-use industries, indicating an expected increase in demand during the forecast period.

“Aluminium segment, by material, to be the second-largest market from 2023 to 2030.”

In 2022, the aluminum-laminated busbar segment held a 17.8% share of the laminated busbar market in terms of material. The cost-effectiveness of aluminum-laminated busbars compared to copper-laminated ones, especially beneficial in price-sensitive markets like Asia Pacific and the Middle East & Africa, contributes to their market share. Utilizing aluminum as a conductor offers a doubled conductivity per mass compared to copper, resulting in more than a 30% cost savings. With a lower density, aluminum-laminated busbars are lighter than their copper counterparts, making them suitable for applications where conductor weight is critical. Although aluminum conductors traditionally exhibit lower conductivity and a risk of oxidation, advancements in materials technology, such as tin plating, have addressed many limitations and improved performance. The rapid adoption of aluminum conductors is notable in distribution panels and busway systems for applications like households and data centers, indicating an expected surge in demand for aluminum-laminated busbars during the forecast period.

“North America to be third-largest region in laminated busbar market.”

In 2022, North America held an 18.2% share of the global laminated busbar market, encompassing the US, Mexico, and Canada. The demand for laminated busbars in the region is driven by the imperative to upgrade aging electrical infrastructure in both the US and Canada. According to the Grid Modernization and the Smart Grid publication by the US Department of Energy, North America's transmission & distribution infrastructure is antiquated and in need of modernization. In response, utility companies and various stakeholders are investing in replacing outdated electrical equipment and upgrading transmission & distribution networks with advanced technologies. Over the next two decades, utility companies in the US and Canada are projected to invest approximately USD 880 billion and USD 100 billion, respectively, in power networks, spanning transmission & distribution networks. These investments encompass initiatives such as smart grids, asset monitoring, and smart grid analytics, with the adoption of smart technologies expected to further drive the laminated busbar market.

The 'Global Landscape of Renewable Energy Finance 2023' report by the International Renewable Energy Agency highlights North America as the recipient of the second-highest influx of investments in renewable energy. In 2019, the region attracted USD 68 billion, constituting 21% of the global total, and in 2020, it drew USD 53 billion, equivalent to 15% of the global total, with a focus on the US. However, the region's share of funding has gradually diminished due to a decline in domestic investments within the US. Preliminary data suggests that investments in the region rose to nearly USD 66 billion in 2021 but then decreased to USD 59 billion in 2022. These trends are anticipated to drive the laminated busbar market in North America.

Breakdown of Primaries:

Thorough interviews were conducted with key industry participants, subject-matter experts, C-level executives from prominent market players, and industry consultants, among other experts. These interviews aimed to acquire and authenticate essential qualitative and quantitative information, providing insights into future market prospects. The primary interviews were structured as follows:

By Company Type: Tier 1-55%, Tier 2-30%, and Tier 3-15%

By Designation: C-Level-30%, D-Level-20%, and Others-50%

By Region: Asia Pacific–60%, North America–18%, Europe–8%, Middle East & Africa–10%, and South America–4%

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Note: “Others” include sales managers, engineers, and regional managers

The tiers of the companies are defined based on their total revenue as of 2021: Tier 1: >USD 1 billion, Tier 2: USD 500 million–1 billion, and Tier 3:

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*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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