

Low Voltage Protection and Control Market by Product Type (Protection Equipment, Switching Equipment, and Monitoring Devices), End-use (Residential, Commercial, and Industrial (Oil & Gas, EV Charging)), and Region - Global Forecast to 2025

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Abstracts

“The global low voltage protection and control market is projected to grow at a CAGR of 5.97%, from 2018 to 2025.”

The global low voltage protection and control market is projected to reach USD 19.8 billion by 2025 from an estimated USD 13.2 billion in 2018, at a CAGR of 5.97%. This growth can be attributed to factors such as increasing demand for renewable energy products, growing per capita consumption of energy, and demand for safe and secure electrical systems. However, grey market and the presence of inferior quality products along with high cost of monitoring devices is expected to restrict the growth of the market.

“The monitoring devices segment is expected to be the fastest growing market from 2018 to 2025.”

The monitoring devices segment which includes the metering and communication and measurement devices is estimated to be the fastest growing segment during the forecast period. Growing energy efficiency targets and increasing smart grid investments are expected to drive the market during the forecasted period. Furthermore, monitoring devices enable the users to individually monitor their energy consumption and device energy efficiency plans that will reduce energy consumption and reduce the cost of operations.

“The industrial segment, by end-use type, is expected to be the largest market from 2018 to 2025.”

The industrial segment is expected to hold the largest market share during the forecast period because of its increasing EV sales and EV charging infrastructure as well as the growing data center investments and operations across the globe. The share of EV's is increasing every year, globally. The EV charging stations, such as slow and fast chargers, are also witnessing an increase to meet the increasing demands. Increasing subsidies for EV's and the need to meet the operating range of EV's is driving the market for low voltage protection and control.

“Asia Pacific: The second fastest growing market for low voltage protection and control.”

The Asia Pacific region is expected to be the 2nd fastest growing market for low voltage protection and control, by 2025. The low voltage protection and control market in this region is mainly driven by growing per capita consumption of energy, increasing urbanization, growing middle class, the favorable market for electric vehicles, and datacenters. Countries such as China and India are among the fastest growing countries, they have major climate change and renewable energy targets to implement during the forecast period. For instance, China and India have targets to install 210 GW and 175 GW of renewable energy power generation by 2023 which is expected to drive the market for low voltage protection and control.

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- 60%, Tier 2- 23%, and Tier 3-17%

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

By Region: Asia Pacific- 29%, Europe- 22%, North America- 18%, Middle East- 14%, Latin America- 12%, and Africa-5%

Note: Others includes sales managers, marketing managers, product managers, and product engineers.

The tier of the companies is defined on the basis of their total revenue as of 2017. Tier 1: USD 1 billion, Tier 2: From USD 1 billion to USD 500 million, and Tier 3:

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