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Merging Unit Market By Type (Standalone, Integrated), Voltage (Low, Medium, High), Configuration (With Relay, Without Relay), End User (Utilities, Industrial, Commercial, Data Centers, Renewable Energy, Transportation, Others), Region - Forecast to 2030

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Abstracts

The global merging unit market is estimated to be valued at USD 367.4 million in 2025 and USD 477.7 million by 2030, exhibiting a CAGR of 5.4% during the forecast period. The need to boost infrastructure development in key markets, such as renewable energy, industrial, and utilities, spurs the demand for merging units. India is witnessing a resurgence of state-driven investment in infrastructure through the National Infrastructure Pipeline and increased capital expenditure, which is witnessing renewed investment in mature assets, including power and transportation, and the growth of new digital-related infrastructure. Such endeavours entail major overhauls in electrical and control systems, and the number of merging units involved in these systems is large and highly complex. They need to be handled efficiently to create a secure environment with a guarantee of expediency. In the US, infrastructure continues to be chronically underfunded and deteriorated, and federal infrastructure investment policy is targeting greatly upgrading energy, transport, and digital networks, including trillion-dollar spending, with the signature legislation of the Infrastructure Investment and Jobs Act. This high level of infrastructure development increases the demand for merging units to drive motor efficiency, ease installation, and enable operations and maintenance.

“By configuration, the with relay output segment is expected to hold the largest market share in 2030.”

The merging unit market by configuration has relay output as its major segment, as it offers direct interface capabilities for substation protection and control systems. It is

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common in places where immediate switching or tripping operations are necessary. With the help of relay outputs, merging units can communicate with relays and switchgear, which in turn ensures protection coordination, fault isolation, and system automation at high speed and is reliable. The said configuration is compatible with old and new substation designs; thus, it is adopted rapidly in retrofit and greenfield projects, which makes it the most useful capital and industries paying for operational reliability and seamless integration highly.

“By end user, the renewable energy segment is likely to record the highest CAGR from 2025 to 2030.”

Considering the rise of wind, solar, and hybrid power plants that need sophisticated grid integration and efficient protection systems, renewable energy is likely to be the fastest-growing end-user segment in the merging unit market. Merging units are the means for real-time digitalization and exact control of variable energy flows. They help grid stability and compliance with the changing IEC 61850 protocols. The desire for remote monitoring, better automation, and decentralized grid architectures is also a significant factor in the renewables sector, as operators make it a point to install intelligent substations to optimize performance and reliability in the networks that are getting increasingly complex.

“By region, Europe is estimated to be the second-largest market during the forecast period.”

Europe is expected to be the second-largest region in the merging unit market due to the extensive and advanced investment in grid modernization, the integration of renewable energy, and the implementation of progressive energy policies. Utilities in Europe and transmission system operators emphasize upgrading substations to digital standards, especially with the widespread use of IEC 61850 devices. The fast installation of wind and solar power plants, the strong electrification support, and the emphasis on sustainability are some major factors leading to a high demand for advanced substation automation. Incentives provided by the government, regulatory mandates, and partnerships among the major manufacturers also facilitate the uptake of merging units in the regional power sector, which is diverse and mature.

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 and assess future market prospects. The distribution of primary interviews is as follows:

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By Company Type: Tier 1 - 30%, Tier 2 - 45%, and Tier 3 - 25%
By Designation: C-level Executives - 30%, Directors - 20%, and Others - 50%
By Region: North America - 20%, Europe - 24%, Asia Pacific - 36%, Middle East & Africa - 8%, and South America - 12%

Notes: The tiers of companies are defined based on their total revenues as of 2024. Tier 1: > USD 1 billion, Tier 2: USD 500 million to USD 1 billion, and Tier 3:
Other designations include sales managers, engineers, and regional managers.

GE Vernova (US), Hitachi Electric (Switzerland), Arteche (France), Schweitzer Engineering Laboratories, Inc. (US), and Ingeteam (Spain) are some major players in the merging unit market. The study includes an in-depth competitive analysis of these key players, including their company profiles, recent developments, and key market strategies.

Research Coverage:

The report defines, describes, and forecasts the global merging unit market by voltage, application, power rating, end user, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report comprehensively reviews 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 future trends in the merging unit market.

Key Benefits of Buying the Report

It provides an analysis of key drivers (Rapid digital substation deployment aligned with IEC 61850 standards), restraints (Limited technical expertise to support digital protection systems), opportunities (Massive retrofit potential in aging transmission & distribution infrastructure), and challenges (Stringent cybersecurity requirements to protect merging units as critical interfaces in digital substations) influencing the growth of the merging unit market.

Market Development: Comprehensive information about lucrative markets–the report analyzes the merging unit market across varied regions.

Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the merging

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unit market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players, such as GE Vernova (US), Hitachi Energy (Switzerland), Arteche (Spain), Schweitzer Engineering Laboratories, Inc. (US), Ingeteam (Spain), ABB (Switzerland), Siemens (Germany), Schneider Electric (France), NR Electric Co., Ltd (Jiangsu), Toshiba Corporation (France), Powercap Electric SDN. BHD. (Malaysia), CYG Sunri Co., Ltd. (China), Efacec (Portugal), and Power Grid Components (Alabama), among others, are in the merging unit market.

Product Innovation/Development: Schneider Electric unveiled its One Digital Grid Platform, a unified architecture that combines protection, control, automation, and “stand-alone merging unit” capability under its PowerLogic P7 platform. The platform is aimed at simplifying operations for utilities, accelerating grid digitalisation, and enabling faster deployment of IEC 61850 process-bus systems. Similarly, Hitachi Energy’s SAM600 3.0 is a modular process interface unit that can function as a merging unit, a switchgear control unit, or in a single device. As a merging unit, it converts analog signals from instrument transformers into IEC 61850 digital data for process-bus architectures. As a switchgear control unit, it interfaces directly with breakers and switches to reduce copper wiring and simplify substation layouts.

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