

Protective Relay Market by Voltage (High, Medium, Low), End-User (Utilities, Industrial, Railways, Others), Application (Feeder, Transmission Line, Motor, Transformer, Generator, Breaker, Capacitor Bank, Busbar), Type, and Region - Global Forecast to 2025

<https://marketpublishers.com/r/PF4EC0E8242EN.html>

Date: April 2020

Pages: 166

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

ID: PF4EC0E8242EN

Abstracts

“The protective relay market is projected to reach USD 2.7 billion by 2025, at a CAGR of 5.7% from 2020 to 2025.”

The global protective relay market is projected to reach USD 2.7 billion by 2025 from an estimated market size of USD 2.0 billion in 2020, at a CAGR of 5.7% during the forecast period. The increasing share of renewable energy are expected to drive the demand for protective relay. Various application types of protective relay are increasing in utilities, industries, railways, and other (airports, hospitals, commercial complexes), which would further aid the growth of this market. The lack of investment by the government in grid stability is a restraint for the growth of the protective relay market.

“The low voltage segment, by voltage, is expected to grow at the highest rate in the forecast period”

The low voltage segment is expected to grow at the highest rate in the forecast period. Low voltage relays are used in low voltage applications in utilities and other applications like motors and lifts in industrial and commercial buildings. The increasing focus on industrial and commercial activity will drive the long term growth of this segment all over the world, particularly in Asia Pacific.

“The Utility segment, by end-user, is expected to grow at the highest rate during the forecast period”

The three-phase segment is estimated to grow at the highest rate of all segments during the forecast period. New distribution network and grid expansion projects, replacement of old electromechanical protective relays with new and more advanced numeric relays, substation automation for improved power quality, and implementation of smart grids for better grid management are expected to drive the segment.

“Asia Pacific is expected to lead the global protective relay market in terms of market size”

Asia Pacific is currently the largest protective relay market, followed by North America and Europe. The growth of a protective relay market in Asia Pacific can be attributed to the increasing demand for electrical energy due to urbanization and industrialization, distribution network upgrade, and the increasing renewable energy sector. Also, rising investments in smart grid infrastructure projects that include distribution automation would result in an increased demand for protective relay in the Asia-Pacific region.

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 I: 60%, Tier II: 27%, and Tier III: 13%

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

By Region: Asia Pacific: 40%, North America: 20%, Europe: 18%, RoW: 16%, South America: 6%,

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: USD 500 million–1 billion, and Tier 3:

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