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Recloser Market by Phase (Three-phase, Single-phase, and Triple Single-phase), Control Type (Electronic and Hydraulic), Voltage Rating (Up to 15 kV, 16-27 kV, and 28-38 kV), Insulation Medium (Oil, air, and epoxy) Region - Global Forecast to 2030

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Abstracts

The global recloser market is on a trajectory to reach USD 1.5 billion by 2030, a notable increase from the estimated USD 1.1 billion in 2024, with a steady CAGR of 5.0% spanning the period from 2024 to 2030. The future of the recloser market is brimming with potential, driven by a confluence of factors that necessitate grid modernization, improved reliability, and environmental considerations. Aging grid infrastructure across the globe necessitates upgrades to prevent outages and ensure reliable power delivery. Reclosers offer a cost-effective solution for enhancing protection in specific sections of the grid. Their ability to automatically isolate faults and minimize outage durations aligns perfectly with the goals of grid modernization initiatives. The increasing penetration of renewable energy sources like wind and solar farms requires robust grid integration solutions. Reclosers play a crucial role here by managing the inherent variability of renewable generation. Their ability to handle fault currents associated with these distributed sources and ensure overall grid stability will be increasingly valuable. Environmental concerns regarding the use of mineral oil in traditional oil-insulated reclosers (OIL reclosers) and SF6 gas in some switchgear alternatives are prompting a shift towards more sustainable options. The future of the recloser market is promising. It hinges on the ability of manufacturers to adapt to evolving grid needs, embrace sustainable technologies, and integrate seamlessly with smart grid systems. By focusing on cost-competitiveness, innovation, and data-driven solutions, the recloser market is poised to play a vital role in ensuring a reliable, efficient, and environmentally conscious power grid of the future.

"16-27 kV segment, by voltage taring, to be second-fastest growing market from 2024 to 2030."

Reclosers serve as the workhorses of medium voltage distribution networks, offering automated fault protection and isolation. While they come in a variety of voltage ratings, a crucial segment lies between 16 kV and 27 kV. Reclosers with a voltage rating of 16-27 kV are specifically designed for medium voltage distribution networks. This range effectively covers the most commonly used voltage levels in medium voltage distribution systems, offering a versatile solution for utilities. These reclosers function as automatic circuit interrupters. They continuously monitor the power line for faults using sensors. Upon detecting a fault, they automatically interrupt the current flow using an arc quenching mechanism (oil, vacuum, etc.). Growing environmental regulations and a focus on sustainability are likely to influence the market share within the 16-27 kV range. Solid dielectric reclosers are expected to see increased adoption due to their eco-friendly nature. dvancements in areas like arc quenching technology for AIR reclosers and cost reduction strategies for solid dielectric reclosers could open doors for wider adoption of these sustainable alternatives within the 16-27 kV segment.

"Hydraulic segment, by control type, to be the second-largest market from 2024 to 2030."

Hydraulic reclosers have been the backbone of automated fault protection in medium voltage distribution networks for decades. Their functionality revolves around a unique control mechanism that utilizes hydraulics for operation. Similar to other recloser types, hydraulic reclosers function as automatic circuit interrupters. Sensors continuously monitor the power line for faults. Upon detection, a fault current triggers a rapid increase in pressure within a sealed hydraulic circuit. This pressure surge activates a tripping mechanism that interrupts the current flow using internal contacts. The hydraulic system also plays a role in the reclosing sequence. After a pre-programmed delay, the hydraulic pressure is released, allowing the contacts to reclose and re-energize the line. This automated cycle continues for a set number of attempts, aiming to clear temporary faults while isolating persistent ones. Hydraulic reclosers were traditionally the dominant technology within the 16-27 kV recloser segment, finding application in various aspects of medium voltage distribution networks such as distribution feeders, overhead lines, substations (in conjunction with other switchgear). Hydraulic systems necessitate periodic maintenance to ensure proper operation and prevent leaks. This adds to the overall lifecycle cost compared to simpler electronic controls. While their dominance might wane due to the rise of electronic controls, they are likely to remain a viable option for specific applications and within existing infrastructure. As the recloser market

evolves, advancements in technology and a focus on cost-effectiveness will determine the future trajectory of hydraulic reclosers.

“Middle East & Africa to be fourth largest region in recloser market.”

The Middle East and Africa (MEA) recloser market presents a unique landscape with immense potential for future growth. Compared to North America or Europe, the MEA recloser market is in a relatively nascent stage. While some established utilities in the region utilize reclosers, overall penetration remains limited. Similar to other regions, aging grid infrastructure in many MEA countries necessitates upgrades for improved reliability and reduced outages. Reclosers offer a cost-effective solution for enhancing fault protection in specific sections of the grid. Government initiatives aimed at expanding electricity access to remote areas in Africa present an opportunity for reclosers. Their compact size and ease of installation make them suitable for these applications. The growing focus on renewable energy sources like solar and wind farms creates a need for grid integration solutions. Reclosers can manage fault currents associated with these distributed generation sources. The future of the MEA recloser market hinges on addressing specific challenges and capitalizing on emerging trends. Developing innovative financing models that make reclosers more accessible for utilities with limited budgets will be crucial for market expansion. Building local expertise in recloser installation, maintenance, and operation is essential for wider adoption. Training programs and knowledge-sharing initiatives can bridge this gap. The MEA recloser market is on the cusp of significant growth. By addressing challenges related to financing, expertise, and sustainability, and by offering cost-effective solutions with comprehensive support services, manufacturers can tap into the immense potential of this evolving market.

Breakdown of Primaries:

In-depth interviews with key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, were conducted to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The primary interviews were distributed as follows:

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

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

By Region: North America–18%, Europe–8%, Asia Pacific–60%, South America–4%

and

Middle East & Africa–10%.

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, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.

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