

Top 10 High & Medium Voltage Products Market HV (Switchgear, HV Cables, Power Transformer), MV (Ring Main Unit, Recloser, MV Cables, Voltage Regulator, Surge Protection Device, Disconnect Switch), Installation Type End User - Global Forecast to 2028

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Abstracts

The Top 10 high and medium voltage products market is estimated to grow from USD 264.1 Billion in 2023 to USD 349.7 Billion by 2028; it is expected to record a CAGR of 5.8% during the forecast period. The demand for high and medium voltage products is rising due to increasing energy needs, integration of renewable energy sources, electrification of sectors like transportation, and ongoing grid modernization efforts.

“Medium Voltage: The second-fastest segment of the top 10 high and medium voltage market, by product.”

Based on product type, the Top 10 high and medium voltage products market has been split into two types: Medium voltage and High voltage. The adoption of high voltage is growing and is expected to be the second fastest segment. This is due to their extensive use in urban and industrial areas with growing electricity demand, their importance in integrating renewable energy sources, and their role in grid modernization, ensuring efficient power distribution within existing infrastructure.

“Industrial segment is expected to emerge as the second-largest segment based on end user.”

Based on end users, the top 10 high and medium voltage products market has been

segmented into transmission and distribution, industrial, residential, and commercial. The industrial segment is expected to be the second-largest segment owing to the dependence of industries on medium and high voltage equipment to power heavy machinery, manufacturing processes, and large-scale operations, driving a significant demand for these products. Additionally, the need for industrial infrastructure expansion and modernization further contributes to the prominence of the industrial segment in this market.

“Indoor is expected to emerge as largest segment based on Installation type.”

By installation type, the top 10 high and medium voltage product market has been segmented into outdoor and indoor. Indoor is expected to emerge as largest segment based on installation type. These installations offer a controlled and protected environment, ensuring safety and mitigating environmental risks associated with high and medium voltage equipment. They are also more space-efficient, a vital consideration in urban areas with limited real estate. Indoor installations provide easy access for maintenance and inspection, resulting in increased reliability and reduced downtime.

“North America is expected to be the second-fastest region in the top 10 high and medium voltage product market.”

North America is expected to be the second-fastest region in the top 10 high and medium voltage product markets between 2023–2028, preceded by Asia Pacific. The region has a well-established electrical infrastructure that requires continuous modernization and upgrades to ensure reliability and efficiency. Moreover, a growing emphasis on renewable energy integration and grid resilience drives demand for high and medium voltage products. Additionally, a thriving industrial sector and the adoption of electric vehicles in North America further contribute to the need for these products, solidifying the region's prominent position in the market. These are the key factors fostering the growth of the Top 10 high and medium voltage products market in the North America.

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- 45%, Tier 2- 30%, and Tier 3- 25%

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

By Region: North America- 27%, Asia Pacific- 33%, Europe- 20%, the Middle East & Africa- 12%, and South America- 8%

Note: Others include product engineers, product specialists, and engineering leads.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2021. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: The Top 10 high and medium voltage products market is dominated by a few major players that have a wide regional presence. The leading players in the refinery and petrochemical filtration market are ABB (Switzerland), Prysmian SpA (Italy), Schneider Electric (France), Hitachi Global (Japan), and Siemens (Germany).

Research Coverage:

The report defines, describes, and forecasts the global Top 10 high and medium voltage products market, by product, installation type, end user and region. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a comprehensive review of 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 top 10 high and medium voltage products market.

Key Benefits of Buying the Report

Rise in grid investments and growing demand for reliable and continuous power supply drive the demand. Factors such as delays in procurement and installation of electrical equipment due to complex regulatory and environment authorizations procedures and implementation of stringent regulations hinder market growth. Continuous increase in power generation capacity and increasing developments of smart grids and growing digitalization offer lucrative opportunities in this market. Supply-chain constraints and requirement for high technical expertise to develop and install power cables are major challenges faced by countries in this market.

Product Development/ Innovation: The trends such as Intelligent switchgear are groundbreaking advancements in the industry, integrating advanced sensing capabilities and connectivity for improved control and data analysis. It enhances the monitoring and predictive analytics process by incorporating intelligent electronic devices (IEDs), including smart circuit breakers, sensors, and microprocessor-based relays and meters. Additional sensors like humidity, temperature, vibration, motion, noise, and light provide crucial data for assessing equipment health.

Market Development: The development of smart grids is essential to achieve shared goals for energy security, economic development, and climate change mitigation. Smart grids enable increased demand response and energy efficiency, integration of variable renewable energy resources into the power grid infrastructure, and electric vehicle recharging services while reducing peak demand and stabilizing the electricity system.

Market Diversification: ABB launched the latest and narrowest in their air-insulated (AIS) medium-voltage (MV) switchgear, UniGear ZS1, 500mm panel version, at ADIPEC 2023. The new 500 mm version of UniGear ZS1 is designed with higher sustainability targets and raises the bar for safety with its innovative design and carefully selected material mix.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like ABB (Switzerland), Prysmian SpA (Italy), Schneider Electric (France), Hitachi Global (Japan), and Siemens (Germany) among others in the Top 10 high and medium voltage products market.

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