

Surge Arrester Global Market Insights 2026, Analysis and Forecast to 2031

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Abstracts

A surge arrester is a critical protective device installed in electrical power systems to safeguard equipment from the damaging effects of transient overvoltages. These overvoltages, often referred to as surges, can be caused by external events such as lightning strikes or internal system events like switching operations. The primary function of a surge arrester is to provide a low-impedance path to the ground for the surge current, effectively limiting the voltage to a safe level and protecting expensive infrastructure such as transformers, motors, and switchgear. Once the surge has passed, the arrester must immediately return to its high-insulation state to prevent the flow of normal power frequency current to the ground.

The global surge arrester market is a vital segment of the broader electrical infrastructure industry, characterized by steady growth driven by the need for grid reliability and the protection of increasingly sensitive electronic equipment. The economic stakes are significant; globally, lightning strikes cause billions of dollars in damage to electrical and related infrastructure annually. In the United States alone, property insurance claims related to lightning damage exceeded 500 million USD in 2025. This underscores the essential nature of surge protection in both developed and emerging economies.

The market size for surge arresters is estimated to reach between 1.8 billion USD and 3.5 billion USD in the year 2026. As utilities and industrial operators continue to invest in hardening their electrical networks against climatic events and operational transients, the market is projected to expand further. Between 2026 and 2031, the industry is expected to achieve a Compound Annual Growth Rate (CAGR) ranging from 2.1% to 3.8%. This growth is supported by the ongoing global energy transition, which involves the integration of renewable energy sources and the expansion of high-voltage

transmission networks.

Regional Market Analysis

The Asia-Pacific region is estimated to command the largest share of the global surge arrester market, ranging from 35% to 45%. This dominance is primarily driven by massive infrastructure investments in China, India, and Southeast Asian nations. In China, the continued development of Ultra-High Voltage (UHV) transmission lines to transport power from inland renewable sources to coastal load centers requires sophisticated, high-capacity surge arresters. India is also a major growth engine, with aggressive grid expansion and rural electrification programs. The presence of major Japanese manufacturers such as Meidensha, Mitsubishi Electric, and Toshiba further strengthens the regional ecosystem.

North America is projected to hold a market share ranging between 25% and 35%. The market in this region is characterized by a high volume of replacement and retrofit activities aimed at modernizing aging electrical grids. The emphasis on grid resiliency is a major driver, as utilities seek to minimize outages caused by severe weather and lightning. A notable trend in the North American landscape is the strategic focus on repair and contractor solutions. For instance, in October 2025, Dallas-based CSW Industrials acquired Motors and Armatures Parts (MARS Parts) for 650 million USD. While MARS Parts is a distributor of HVAC/R parts, the acquisition highlights the strategic value of the repair and maintenance market, which is equally critical for electrical components like surge arresters in the North American utility and industrial sectors.

Europe is estimated to account for a market share between 20% and 30%. The European market is highly focused on innovation and the integration of surge protection into modern building management and distribution systems. On October 1, 2025, Schneider Electric launched a new generation of surge protection devices (SPDs) in the UK, specifically designed for direct integration with UK-style fishbone distribution boards. This development represents a significant step in enhancing safety and convenience for residential and commercial installations, allowing for compact and cost-effective protection against transient overvoltages. Additionally, Europe's aggressive push for renewable energy requires specialized surge protection for wind and solar farms.

The Middle East and Africa (MEA) region is estimated to hold a market share of

5% to 10%. Growth in this region is tied to the expansion of power generation capacity and the development of new industrial zones. In the Middle East, high-temperature environments and the need for desalination and oil and gas infrastructure drive the demand for robust, high-performance arresters. In Africa, the focus is on building basic power transmission infrastructure and increasing the reliability of existing urban grids.

South America is projected to possess a market share ranging from 5% to 10%. Brazil and Chile are the primary contributors to this market, with significant investments in both mining infrastructure and renewable energy. The region's geography, particularly in areas with high lightning activity, makes surge arresters an indispensable component for both utility operators and the large-scale industrial sector.

Application and Segmentation Analysis

Utilities represent the largest application segment for surge arresters. This includes high-voltage transmission networks and medium-to-low-voltage distribution systems operated by power companies. Surge arresters in this segment are essential for protecting multi-million dollar assets like power transformers. As grids become more complex with the addition of distributed energy resources, the need for coordinated surge protection across the entire network increases. Digitalization is also a key trend here, with utilities increasingly looking for arresters with monitoring capabilities that can provide data on leakage currents and surge counts.

Industries constitute a significant portion of the market, encompassing manufacturing plants, oil and gas facilities, and chemical processing units. Industrial operations are highly sensitive to power quality and transients, which can cause equipment failure and costly production downtime. Innovation in this space is ongoing; on March 13, 2026, TDK unveiled its MT40 series of ThermoFuse varistors, aimed specifically at industrial and infrastructure electronics. These components combine high surge capability with integrated safety features in a compact form factor, simplifying the design of robust protection for engineers and improving system reliability.

Transportation is a critical and growing application segment, particularly in the context of rail electrification and urban transit systems. Electric locomotives and

metro cars rely on overhead catenary lines which are highly susceptible to lightning strikes. Surge arresters are used both on the rolling stock and at traction substations to ensure continuous service and protect the sophisticated electronics used in modern transit systems. As more countries invest in high-speed rail to reduce transportation-related carbon emissions, the demand for specialized surge protection in this sector is expected to rise.

Value Chain and Industry Structure Analysis

The value chain of the surge arrester industry is a specialized sequence that begins with the sourcing of high-purity raw materials. The most critical component is the varistor block, typically made from Zinc Oxide (ZnO) mixed with other metal oxide additives. The performance of a surge arrester is fundamentally determined by the quality and non-linear characteristics of these ZnO discs. Other key materials include high-grade aluminum for electrodes and housing materials such as porcelain or high-performance polymers (silicone rubber).

The manufacturing stage involves the precision sintering of ZnO discs followed by the assembly of the arrester column. Modern arresters increasingly use polymeric housings rather than traditional porcelain because polymers are lighter, more resistant to vandalism, and offer better safety performance in the event of an internal failure. Advanced testing is a core part of the manufacturing process, where arresters are subjected to high-voltage impulses and thermal stability tests to ensure they meet international standards such as IEC or IEEE.

The distribution and service phase involves a mix of direct sales to large utilities and sales through specialized electrical distributors. The industry structure is characterized by a group of large, global conglomerates that provide integrated power solutions, alongside specialized manufacturers that focus primarily on protection devices. The downstream segment includes electrical contractors and utility engineers who specify and install the devices. The move toward smart grids is also encouraging the development of monitoring services, where third-party firms or original equipment manufacturers provide real-time data on the health and performance of installed surge arresters.

Key Market Players and Company Developments

Hitachi operates as a dominant force in the global energy sector, particularly

through its Hitachi Energy division. The company provides a comprehensive portfolio of high-voltage surge arresters that are used in some of the world's most demanding power transmission projects. Hitachi focuses on extreme reliability and has been at the forefront of developing arresters for UHVDC (Ultra-High Voltage Direct Current) applications, which are essential for long-distance power transport.

ABB is a pioneering technology leader that serves utilities, industry, and transport globally. ABB's surge arrester products are known for their technical excellence and are designed to provide superior protection for power transformers and switchgear. The company emphasizes digital integration, offering solutions that allow operators to monitor the condition of their arresters remotely, thereby improving grid maintenance and uptime.

Siemens Energy is a major player in the surge arrester market, providing solutions that span the entire energy value chain. Their arresters are utilized in transmission and distribution networks worldwide, with a strong focus on sustainability and efficiency. Siemens Energy is active in the development of arresters for offshore wind applications, where equipment must withstand highly corrosive environments while maintaining high performance.

General Electric (GE Vernova) provides a robust range of surge protection solutions through its Grid Solutions business. GE's arresters are widely deployed across North America and international markets, protecting critical utility assets. The company focuses on material science innovation to enhance the durability and energy-handling capacity of its metal oxide varistors.

Eaton is a leading power management company that provides surge arresters for a wide variety of industrial, commercial, and utility applications. Eaton's products are particularly strong in the North American distribution market. The company focuses on providing easy-to-install, reliable protection that helps customers manage their electrical systems more safely and efficiently.

Hubbell is a significant manufacturer of electrical and electronic products for a broad range of non-residential and residential construction, industrial, and utility applications. Through its Hubbell Power Systems division, the company offers a comprehensive line of surge arresters, including the popular Ohio Brass brand. Hubbell is known for its high-quality polymer-housed arresters used in distribution networks.

CG Power (CG Power and Industrial Solutions) is a prominent manufacturer of electrical equipment based in India with a global presence. The company provides a range of lightning arresters for various voltage levels, supporting the massive expansion of the power grid in South Asia and other emerging markets. Their products are valued for being both technically sound and cost-competitive.

Schneider Electric is a global leader in the digital transformation of energy management and automation. The company provides surge protection solutions across the entire residential, commercial, and industrial spectrum. Its recent launch of the plug-on SPD for the UK fishbone distribution board illustrates its focus on localizing innovation to meet specific regional installation standards and improving the speed of deployment for contractors.

Meidensha is a Japanese manufacturer with a deep legacy in heavy electrical equipment. The company was a pioneer in the commercialization of Zinc Oxide surge arresters. Meidensha continues to be a technical leader, providing high-performance arresters for utilities and industrial plants, with a strong emphasis on the Asian market and high-reliability Japanese infrastructure.

Mitsubishi Electric is a global leader in the manufacture and sale of electrical and electronic equipment. Within the surge arrester market, Mitsubishi Electric provides high-reliability solutions for power systems, including specialized arresters for railway applications and high-voltage transmission. Their focus on precision engineering ensures that their products perform consistently under harsh electrical conditions.

Toshiba is a diversified electronics and electrical equipment manufacturer that provides advanced surge protection solutions. Toshiba's surge arresters are integrated into large-scale power systems and industrial facilities. The company leverages its expertise in material science and power electronics to deliver arresters that offer high energy absorption and long-term stability.

Market Opportunities

The rapid expansion of renewable energy infrastructure presents a major opportunity for the surge arrester market. Wind turbines and solar arrays are often located in open, elevated, or exposed areas that are highly susceptible to

lightning. Protecting these assets requires specialized surge arresters that can handle the unique electrical characteristics of renewable energy systems, including the DC-side protection of solar inverters.

The global trend toward grid modernization and the implementation of smart grids creates a demand for intelligent surge protection. There is an increasing opportunity for manufacturers to integrate sensors and communication modules into surge arresters. These 'smart' arresters can provide real-time alerts on surge events and leakage current changes, allowing utilities to perform condition-based maintenance and replace units before they fail.

Massive investments in electric vehicle (EV) charging infrastructure and high-speed rail systems offer new growth avenues. EV charging stations are sensitive to grid transients and require robust surge protection to prevent damage to the vehicles and the charging equipment. Similarly, the electrification of railways worldwide drives the need for high-performance traction-class surge arresters.

Market Challenges

Volatility in the price of raw materials, particularly zinc and high-grade aluminum, poses a challenge to manufacturer profit margins. Zinc is the primary component of the varistor discs that are the heart of the arrester. Significant price fluctuations in the global metals market can lead to unpredictable manufacturing costs and pricing pressures.

Ensuring long-term reliability in increasingly harsh environmental conditions is a persistent challenge. As climate change leads to more frequent and severe weather events, surge arresters are being subjected to higher thermal stresses and more frequent lightning activity. Manufacturers must continuously innovate in material science to ensure that polymeric housings and ZnO discs can maintain their performance over a 20-to-30-year lifespan in extreme conditions.

Regulatory and standards compliance across different global markets adds complexity to product development. Manufacturers must navigate various international and regional standards, such as IEC, IEEE, and various national certifications. Adapting product designs to meet these differing technical requirements while maintaining a competitive cost structure requires significant engineering and administrative overhead.

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