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Power Quality Equipment Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Equipment (Surge Arresters, Surge Protection Devices, Harmonic Filters, Power Conditioning Units, Power Distribution Units, Uninterruptable Power Supply, Synchronous Condenser, Voltage Regulator, Digital Static Transfer Switch, Static VAR Compensator, Solid Oxide Fuel Cells, Isolation Transformers, Power Quality Meters, Others), By Phase (Single Phase v/s Three Phase), By Application (Industrial & Manufacturing, Commercial, Residential, Transportation, Utilities), By Region & Competition, 2021-2031F

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Abstracts

The Global Power Quality Equipment Market is projected to expand from USD 37.99 Billion in 2025 to USD 56.28 Billion by 2031, reflecting a CAGR of 6.77%. This market encompasses specialized solutions engineered to monitor and condition electrical power by neutralizing disturbances like voltage sags and harmonic distortions. Growth is driven by the rising dependence on industrial automation and the necessity of modernizing grids to integrate renewable energy. According to the National Electrical Manufacturers Association, the electroindustry business confidence index for future conditions hit 84.6 in 2024, indicating strong growth expectations. These drivers highlight a fundamental demand for reliability distinct from general technological trends.

Nevertheless, the market encounters a major obstacle due to the substantial initial investment needed for advanced power quality systems. The heavy capital expenditure required for installation and retrofitting often discourages cost-conscious enterprises from upgrading legacy infrastructure. This financial hurdle restricts the broad implementation of comprehensive power conditioning frameworks and serves as a primary barrier to market growth in regions facing strict budget constraints.

Market Driver

The increasing need for reliable power in data centers and telecommunications is significantly hastening the adoption of power quality equipment. As hyperscale facilities and artificial intelligence applications grow, tolerance for voltage fluctuations or harmonics decreases to near zero, requiring robust conditioning solutions to guarantee continuous uptime. This essential need for stable electricity is fueling massive capital investment in power infrastructure designed to support high-density computing loads. According to Goldman Sachs' April 2024 'Generational Growth' report, data center power demand is projected to increase by 160% by the end of the decade. Such exponential consumption growth leads directly to greater procurement of uninterruptible power supplies and harmonic filters to protect sensitive servers from electrical disturbances.

At the same time, the modernization of aging electrical transmission and distribution infrastructure acts as a fundamental market driver. Utilities are actively upgrading grids to handle intermittent renewable energy sources and manage bi-directional power flows, creating stability challenges that specialized equipment must address. According to the International Energy Agency's 'World Energy Investment 2024' report from June 2024, grid spending is expected to reach USD 400 billion in 2024, indicating a strategic shift toward resilient network architectures. This wave of investment is resulting in significant industrial activity; for example, Siemens Energy reported in November 2024 that its Grid Technologies business area saw a 34% comparable increase in orders for the fiscal year 2024. This trend underscores the critical role of power quality systems in moving toward a digitalized, low-carbon energy landscape.

Market Challenge

The substantial initial investment needed for installing and retrofitting advanced systems represents a major obstacle to the growth of the Global Power Quality Equipment Market. Specialized conditioning solutions, such as harmonic filters and voltage regulators, require complex engineering and considerable upfront capital, establishing a

restrictive financial barrier for small and medium-sized enterprises (SMEs) or industrial facilities with tight operational budgets. This financial strain often forces cost-conscious organizations to delay essential infrastructure upgrades and keep legacy systems. As a result, despite the technical requirement for reliability, market penetration is significantly limited in sectors where capital allocation is strictly constrained.

The high capital intensity defining this sector creates a structural barrier that divides the market. According to the Edison Electric Institute, U.S. investor-owned electric companies invested a record USD 178.2 billion in energy grid infrastructure in 2024. While large utility providers have the liquidity to support such huge expenditures for modernization, smaller industrial players frequently lack the financial strength to keep up with this investment pace. This growing gap effectively excludes budget-constrained enterprises from the market, thereby restricting the broad adoption of comprehensive power quality frameworks and reducing overall growth potential in non-utility segments.

Market Trends

The market is being reshaped by the development of eco-friendly and sustainable power quality designs, as manufacturers actively eliminate hazardous substances such as sulfur hexafluoride (SF6) and embrace circular economy principles. This trend is propelling the engineering of "green" switchgear and highly efficient power conditioning systems that notably lower carbon footprints without sacrificing grid reliability or performance. The industry's commitment to this shift is demonstrated by significant capital allocation toward green innovation; according to Eaton's '2023 Sustainability Report' from July 2024, the company has invested a cumulative USD 1.3 billion in research and development for sustainable solutions since 2020.

Simultaneously, the widespread implementation of IoT-enabled smart power quality monitoring is converting traditional electrical infrastructure into connected, data-rich assets. This integration enables the continuous collection of vital performance metrics, allowing facility managers to use real-time analytics to detect voltage instabilities and transition from reactive to predictive maintenance strategies. The market's swift adoption of these digital capabilities is boosting financial growth for technology providers; according to a Siemens press release in December 2024 titled 'Smart Infrastructure Sets Higher Ambitions', the Smart Infrastructure division more than doubled its digital business revenue to EUR 1.7 billion over the preceding four years.

Key Market Players

ABB Ltd.

Siemens AG

Schneider Electric SE

Eaton Corporation plc

General Electric Company

Emerson Electric Co.

Mitsubishi Electric Corporation

Toshiba Corporation

Honeywell International Inc.

Legrand SA

Report Scope

In this report, the Global Power Quality Equipment Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Power Quality Equipment Market, By Equipment

- Surge Arresters
- Surge Protection Devices
- Harmonic Filters
- Power Conditioning Units
- Power Distribution Units

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Uninterruptable Power Supply

Synchronous Condenser

Voltage Regulator

Digital Static Transfer Switch

Static VAR Compensator

Solid Oxide Fuel Cells

Isolation Transformers

Power Quality Meters

Others

Power Quality Equipment Market, By Phase

Single Phase v/s Three Phase

Power Quality Equipment Market, By Application

Industrial & Manufacturing

Commercial

Residential

Transportation

Utilities

Power Quality Equipment Market, By Region

North America

United States

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- Canada
- Mexico

Europe

- France
- United Kingdom
- Italy
- Germany
- Spain

Asia Pacific

- China
- India
- Japan
- Australia
- South Korea

South America

- Brazil
- Argentina
- Colombia

Middle East & Africa

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South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Power Quality Equipment Market.

Available Customizations:

Global Power Quality Equipment Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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