

# **Fixed Series Compensation Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Component (Reactors, Capacitors, Protection & Control Systems, Circuit Breakers, Others), By Voltage Level (Low Voltage (Below 33 kV), Medium Voltage (33–132 kV), High Voltage (132–400 kV), Extra High Voltage (Above 400 kV)), By Application (Voltage Stability, Power Flow Control, Transmission Capacity Enhancement, Reduction of Line Losses, System Oscillation Damping), By Region & Competition, 2020-2030F**

<https://marketpublishers.com/r/F978B1AF5FD8EN.html>

Date: July 2025

Pages: 185

Price: US\$ 4,500.00 (Single User License)

ID: F978B1AF5FD8EN

## **Abstracts**

### Market Overview

The Global Fixed Series Compensation (FSC) Market was valued at USD 280.88 Million in 2024 and is projected to reach USD 344.96 Million by 2030, growing at a CAGR of 3.33% during the forecast period. The market is witnessing notable growth as utilities worldwide prioritize cost-effective methods to improve grid performance and transmission capacity. FSC technology reduces transmission line reactance by incorporating capacitors in series, enabling more efficient power flow without constructing new infrastructure. This is especially valuable in high-voltage networks where expansion is limited by cost, time, or environmental factors. The demand for FSC systems is further driven by surging electricity needs due to urbanization, industrial growth, and the electrification of transportation. With renewable energy sources like solar and wind located far from consumption centers, FSC systems are critical in

stabilizing voltage and ensuring efficient long-distance power transmission. Additionally, increasing government initiatives and regulatory support for grid modernization and energy efficiency are accelerating FSC adoption globally.

## Key Market Drivers

### Transmission Grid Modernization and Capacity Expansion

Growing electricity demand and aging infrastructure are leading utilities to invest heavily in transmission network upgrades. Fixed Series Compensation (FSC) plays a pivotal role in improving power flow and reducing congestion in existing lines. Rather than constructing new lines, operators utilize FSC for faster and more economical capacity enhancement. For instance, North America has added over 50 series capacitor banks across its 345 kV and 500 kV lines. Europe has seen up to 35% transmission improvement in its 400 kV systems with FSC integration. India's grid deployed over 40 FSC units to facilitate energy transfer from renewable-rich regions, while Colombia expanded its 500 kV line capacity by 640 MW. FSC systems can compensate 40%–70% of line reactance, enabling utilities to defer capital-intensive new construction. This makes FSC an attractive option in both developing and developed regions for efficient and cost-conscious grid modernization aligned with digital control strategies.

## Key Market Challenges

### High Initial Capital Investment and Long Payback Period

A major hurdle for the Fixed Series Compensation (FSC) market is the significant upfront investment required for deployment. High-voltage FSC systems involve specialized components—such as capacitors, MOVs, and bypass switches—and demand extensive site-specific planning and substation upgrades, resulting in elevated costs. This financial burden can be especially challenging for utilities in emerging markets or those operating under strict budget constraints. Even in advanced economies, the long payback period—often spanning seven to ten years—can deter investment without clear regulatory or financial incentives. FSC projects typically enhance grid reliability and capacity rather than generating direct revenue, making it difficult to justify investment compared to generation projects. Additionally, price sensitivity is heightened by inflation in raw materials like copper and aluminum. Until cost efficiencies through local manufacturing or economies of scale are realized, adoption in price-sensitive regions will remain limited without supportive policies or subsidies.

## Key Market Trends

### Integration of FSC in Renewable-Heavy Transmission Corridors

A key trend shaping the FSC market is its increasing deployment in renewable-dense transmission corridors. As wind, solar, and hybrid energy projects proliferate—often far from end-users—long-distance transmission networks are being pushed to their limits. In regions such as Texas, western China, and North Africa, FSC systems are becoming essential for maintaining voltage and managing fluctuating power flows. These lines often face instability due to intermittent renewable generation, which FSC helps mitigate by enhancing load capacity and reducing voltage drops. In some cases, FSC is integrated with energy storage and demand-side solutions for additional reliability. Many countries are now embedding FSC in transmission infrastructure plans to support carbon neutrality and renewable integration goals. Regulatory mandates in several regions even require compensation systems in new renewable corridors. This trend reinforces FSC's role as a foundational technology in enabling sustainable, high-efficiency power transmission for a renewable-powered future.

## Key Market Players

General Electric Company

Siemens AG

ABB Ltd.

L&T Electrical & Automation

Hyosung Group

Infineon Technologies AG

NR Electric Co., Ltd.

Schneider Electric

American Electric Power

Liaoning Rongxin Xingye Power Technology Co., Ltd.

### Report Scope:

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

#### Fixed Series Compensation Market, By Component:

Reactors

Capacitors

Protection & Control Systems

Circuit Breakers

Others

#### Fixed Series Compensation Market, By Voltage Level:

Low Voltage (Below 33 kV)

Medium Voltage (33–132 kV)

High Voltage (132–400 kV)

Extra High Voltage (Above 400 kV)

#### Fixed Series Compensation Market, By Application:

Voltage Stability

Power Flow Control

Transmission Capacity Enhancement

Reduction of Line Losses

System Oscillation Damping

Fixed Series Compensation Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

South America

Brazil

Argentina

Colombia

Asia-Pacific

China

India

Japan

South Korea

Australia

Middle East & Africa

Saudi Arabia

UAE

South Africa

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Fixed Series Compensation Market.

## Available Customizations:

Global Fixed Series Compensation 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).

## Contents

### 1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### 2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### 3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, and Trends

### 4. VOICE OF CUSTOMER

### 5. GLOBAL FIXED SERIES COMPENSATION MARKET OUTLOOK

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Component (Reactors, Capacitors, Protection & Control Systems, Circuit Breakers, Others)
  - 5.2.2. By Voltage Level (Low Voltage (Below 33 kV), Medium Voltage (33–132 kV), High Voltage (132–400 kV), Extra High Voltage (Above 400 kV))

5.2.3. By Application (Voltage Stability, Power Flow Control, Transmission Capacity Enhancement, Reduction of Line Losses, System Oscillation Damping)

5.2.4. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)

5.3. By Company (2024)

5.4. Market Map

## **6. NORTH AMERICA FIXED SERIES COMPENSATION MARKET OUTLOOK**

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Component

6.2.2. By Voltage Level

6.2.3. By Application

6.2.4. By Country

6.3. North America: Country Analysis

6.3.1. United States Fixed Series Compensation Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Component

6.3.1.2.2. By Voltage Level

6.3.1.2.3. By Application

6.3.2. Canada Fixed Series Compensation Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Component

6.3.2.2.2. By Voltage Level

6.3.2.2.3. By Application

6.3.3. Mexico Fixed Series Compensation Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Component

6.3.3.2.2. By Voltage Level

6.3.3.2.3. By Application

## 7. EUROPE FIXED SERIES COMPENSATION MARKET OUTLOOK

### 7.1. Market Size & Forecast

#### 7.1.1. By Value

### 7.2. Market Share & Forecast

#### 7.2.1. By Component

#### 7.2.2. By Voltage Level

#### 7.2.3. By Application

#### 7.2.4. By Country

### 7.3. Europe: Country Analysis

#### 7.3.1. Germany Fixed Series Compensation Market Outlook

##### 7.3.1.1. Market Size & Forecast

###### 7.3.1.1.1. By Value

##### 7.3.1.2. Market Share & Forecast

###### 7.3.1.2.1. By Component

###### 7.3.1.2.2. By Voltage Level

###### 7.3.1.2.3. By Application

#### 7.3.2. France Fixed Series Compensation Market Outlook

##### 7.3.2.1. Market Size & Forecast

###### 7.3.2.1.1. By Value

##### 7.3.2.2. Market Share & Forecast

###### 7.3.2.2.1. By Component

###### 7.3.2.2.2. By Voltage Level

###### 7.3.2.2.3. By Application

#### 7.3.3. United Kingdom Fixed Series Compensation Market Outlook

##### 7.3.3.1. Market Size & Forecast

###### 7.3.3.1.1. By Value

##### 7.3.3.2. Market Share & Forecast

###### 7.3.3.2.1. By Component

###### 7.3.3.2.2. By Voltage Level

###### 7.3.3.2.3. By Application

#### 7.3.4. Italy Fixed Series Compensation Market Outlook

##### 7.3.4.1. Market Size & Forecast

###### 7.3.4.1.1. By Value

##### 7.3.4.2. Market Share & Forecast

###### 7.3.4.2.1. By Component

###### 7.3.4.2.2. By Voltage Level

###### 7.3.4.2.3. By Application

#### 7.3.5. Spain Fixed Series Compensation Market Outlook

#### 7.3.5.1. Market Size & Forecast

##### 7.3.5.1.1. By Value

#### 7.3.5.2. Market Share & Forecast

##### 7.3.5.2.1. By Component

##### 7.3.5.2.2. By Voltage Level

##### 7.3.5.2.3. By Application

## **8. ASIA PACIFIC FIXED SERIES COMPENSATION MARKET OUTLOOK**

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Component

#### 8.2.2. By Voltage Level

#### 8.2.3. By Application

#### 8.2.4. By Country

### 8.3. Asia Pacific: Country Analysis

#### 8.3.1. China Fixed Series Compensation Market Outlook

##### 8.3.1.1. Market Size & Forecast

###### 8.3.1.1.1. By Value

##### 8.3.1.2. Market Share & Forecast

###### 8.3.1.2.1. By Component

###### 8.3.1.2.2. By Voltage Level

###### 8.3.1.2.3. By Application

#### 8.3.2. India Fixed Series Compensation Market Outlook

##### 8.3.2.1. Market Size & Forecast

###### 8.3.2.1.1. By Value

##### 8.3.2.2. Market Share & Forecast

###### 8.3.2.2.1. By Component

###### 8.3.2.2.2. By Voltage Level

###### 8.3.2.2.3. By Application

#### 8.3.3. Japan Fixed Series Compensation Market Outlook

##### 8.3.3.1. Market Size & Forecast

###### 8.3.3.1.1. By Value

##### 8.3.3.2. Market Share & Forecast

###### 8.3.3.2.1. By Component

###### 8.3.3.2.2. By Voltage Level

###### 8.3.3.2.3. By Application

#### 8.3.4. South Korea Fixed Series Compensation Market Outlook

- 8.3.4.1. Market Size & Forecast
  - 8.3.4.1.1. By Value
- 8.3.4.2. Market Share & Forecast
  - 8.3.4.2.1. By Component
  - 8.3.4.2.2. By Voltage Level
  - 8.3.4.2.3. By Application
- 8.3.5. Australia Fixed Series Compensation Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Component
    - 8.3.5.2.2. By Voltage Level
    - 8.3.5.2.3. By Application

## **9. MIDDLE EAST & AFRICA FIXED SERIES COMPENSATION MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Component
  - 9.2.2. By Voltage Level
  - 9.2.3. By Application
  - 9.2.4. By Country
- 9.3. Middle East & Africa: Country Analysis
  - 9.3.1. Saudi Arabia Fixed Series Compensation Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Component
      - 9.3.1.2.2. By Voltage Level
      - 9.3.1.2.3. By Application
  - 9.3.2. UAE Fixed Series Compensation Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Component
      - 9.3.2.2.2. By Voltage Level
      - 9.3.2.2.3. By Application
  - 9.3.3. South Africa Fixed Series Compensation Market Outlook

#### 9.3.3.1. Market Size & Forecast

##### 9.3.3.1.1. By Value

#### 9.3.3.2. Market Share & Forecast

##### 9.3.3.2.1. By Component

##### 9.3.3.2.2. By Voltage Level

##### 9.3.3.2.3. By Application

## **10. SOUTH AMERICA FIXED SERIES COMPENSATION MARKET OUTLOOK**

### 10.1. Market Size & Forecast

#### 10.1.1. By Value

### 10.2. Market Share & Forecast

#### 10.2.1. By Component

#### 10.2.2. By Voltage Level

#### 10.2.3. By Application

#### 10.2.4. By Country

### 10.3. South America: Country Analysis

#### 10.3.1. Brazil Fixed Series Compensation Market Outlook

##### 10.3.1.1. Market Size & Forecast

###### 10.3.1.1.1. By Value

##### 10.3.1.2. Market Share & Forecast

###### 10.3.1.2.1. By Component

###### 10.3.1.2.2. By Voltage Level

###### 10.3.1.2.3. By Application

#### 10.3.2. Colombia Fixed Series Compensation Market Outlook

##### 10.3.2.1. Market Size & Forecast

###### 10.3.2.1.1. By Value

##### 10.3.2.2. Market Share & Forecast

###### 10.3.2.2.1. By Component

###### 10.3.2.2.2. By Voltage Level

###### 10.3.2.2.3. By Application

#### 10.3.3. Argentina Fixed Series Compensation Market Outlook

##### 10.3.3.1. Market Size & Forecast

###### 10.3.3.1.1. By Value

##### 10.3.3.2. Market Share & Forecast

###### 10.3.3.2.1. By Component

###### 10.3.3.2.2. By Voltage Level

###### 10.3.3.2.3. By Application

## **11. MARKET DYNAMICS**

- 11.1. Drivers
- 11.2. Challenges

## **12. MARKET TRENDS AND DEVELOPMENTS**

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

## **13. COMPANY PROFILES**

- 13.1. General Electric Company
  - 13.1.1. Business Overview
  - 13.1.2. Key Revenue and Financials
  - 13.1.3. Recent Developments
  - 13.1.4. Key Personnel
  - 13.1.5. Key Product/Services Offered
- 13.2. Siemens AG
- 13.3. ABB Ltd.
- 13.4. L&T Electrical & Automation
- 13.5. Hyosung Group
- 13.6. Infineon Technologies AG
- 13.7. NR Electric Co., Ltd.
- 13.8. Schneider Electric
- 13.9. American Electric Power
- 13.10. Liaoning Rongxin Xingye Power Technology Co., Ltd.

## **14. STRATEGIC RECOMMENDATIONS**

## **15. ABOUT US & DISCLAIMER**

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