

Sag Corrector Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Amp Rating (Less than 25A, 26A-110A, 111A-400A, More than 400A), By Line Voltage (Less than 220VAC, 221VAC-415VAC, More than 416VAC). By Wiring Type (Single Phase(L-L), Single Phase (L-N), Three Phase (3-Wire), Three Phase (4-Wire)), By Application (Data Center, Robotics & Machinery, Pharmaceuticals & Medicals), By Region, By Competition

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Abstracts

Global Sag Corrector Market has valued at USD 819.10 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.59% through 2028.

The Sag Corrector market refers to a segment within the electrical power quality industry that specializes in the design, production, and distribution of devices and solutions aimed at mitigating voltage sags or sags in electrical power supply. Voltage sags, also known as voltage dips or power sags, are brief, sudden reductions in the voltage level of an electrical supply, often caused by various factors such as grid disturbances, electrical faults, or the switching on of heavy loads. Sag correctors play a crucial role in maintaining the stability and quality of electrical power, ensuring that sensitive electronic equipment, industrial machinery, and critical infrastructure receive a consistent and reliable voltage supply. These devices typically work by dynamically compensating for voltage sags, injecting additional energy into the electrical system

during sag events to counteract the dip and maintain voltage within acceptable limits. The Sag Corrector market encompasses a range of technologies, including static voltage sag compensators, dynamic voltage restorers, and other power quality solutions. It serves a diverse set of industries, including manufacturing, healthcare, data centers, telecommunications, and renewable energy, where uninterrupted and high-quality power supply is essential for operations. The market's growth is driven by factors such as increasing awareness of power quality issues, regulatory requirements, technological advancements, and the growing adoption of renewable energy sources.

Key Market Drivers

Increasing Demand for High-Quality Video Streaming

In recent years, the global demand for high-quality video streaming services has witnessed exponential growth. With the proliferation of streaming platforms, such as Netflix, Amazon Prime Video, Disney+, and others, consumers have come to expect seamless, high-definition video content. However, the delivery of such content often faces challenges, including signal degradation caused by atmospheric conditions like sagging power lines. This has led to a significant increase in the demand for sag correctors in the global market. Sag correctors play a crucial role in maintaining a stable power supply to data centers and transmission facilities, ensuring uninterrupted video streaming experiences for viewers. As the competition among streaming services intensifies, providers are investing heavily in improving the quality of their content delivery. This, in turn, is driving the adoption of sag correctors, as they are essential for enhancing the reliability and consistency of power supply networks.

Growing Concerns About Power Quality

In an increasingly digital world, power quality is of paramount importance. The proliferation of sensitive electronic equipment and devices, such as servers, routers, and telecommunications equipment, has made businesses and individuals more vulnerable to power disturbances like voltage sags. These disturbances can result in costly downtime, data loss, and equipment damage. Consequently, there is a growing awareness of the need to mitigate power quality issues, and sag correctors have emerged as a key solution. Companies across various industries are investing in sag correctors to safeguard their critical operations against voltage sags and other power disturbances. This heightened concern for power quality is driving the demand for sag correctors globally, as businesses seek to protect their assets and maintain uninterrupted operations.

Rapid Urbanization and Infrastructure Development

The global trend of rapid urbanization and infrastructure development has led to an increased demand for reliable and efficient electrical distribution networks. As cities expand, so does the need for robust power infrastructure to support growing populations and industries. However, many urban areas face challenges related to aging power grids and limited transmission capacity, resulting in voltage sags and other power disruptions. Sag correctors are becoming an integral part of modernizing and strengthening power infrastructure to meet the energy demands of urban areas. Governments and utilities around the world are investing in grid modernization projects to enhance power quality and reliability. Sag correctors are often a critical component of these initiatives, helping to ensure stable voltage levels and reduce the frequency and severity of voltage sags. This trend is expected to continue as urbanization and infrastructure development persist, further driving the global sag corrector market.

Increasing Adoption of Renewable Energy Sources

The global shift towards renewable energy sources, such as wind and solar power, has been a significant driver of the sag corrector market. While renewable energy offers numerous environmental benefits, it also introduces variability and intermittency into the power grid. Fluctuations in energy production can lead to voltage sags and other power quality issues. To mitigate these challenges and ensure a stable power supply, sag correctors are deployed in conjunction with renewable energy systems. As governments and organizations worldwide strive to reduce carbon emissions and transition to cleaner energy sources, the adoption of renewables is expected to continue its upward trajectory. This will further boost the demand for sag correctors, as they play a critical role in integrating renewable energy into existing power grids while maintaining power quality.

Industrial Automation and Industry 4.0

The industrial landscape is undergoing a transformation with the advent of Industry 4.0, characterized by the integration of automation, data exchange, and advanced manufacturing technologies. This transition has led to increased reliance on sensitive electronic equipment and automation systems within manufacturing facilities. Any disruption in power supply, such as voltage sags, can result in costly production downtime and equipment damage. To mitigate these risks, industries are increasingly adopting sag correctors as part of their power quality solutions. These devices help

maintain a stable voltage supply to critical equipment, ensuring continuous and efficient manufacturing processes. With Industry 4.0 concepts driving efficiency and competitiveness, the demand for sag correctors is set to rise further in the industrial sector, contributing to the growth of the global sag corrector market.

Regulatory Initiatives and Standards

Governments and regulatory bodies in various regions are actively addressing power quality issues and mandating the use of sag correctors in certain applications. For example, in regions prone to frequent voltage sags or areas with sensitive loads like hospitals and data centers, there are often stringent standards and regulations in place to ensure power quality. These regulatory initiatives are pushing industries and utilities to invest in sag correctors to comply with requirements and avoid penalties. Moreover, as the awareness of power quality-related issues grows, more regions are likely to adopt similar regulations and standards, further stimulating the demand for sag correctors on a global scale.

In conclusion, the global sag corrector market is being driven by a confluence of factors, including the increasing demand for high-quality video streaming, growing concerns about power quality, rapid urbanization and infrastructure development, the adoption of renewable energy sources, industrial automation trends, and regulatory initiatives. As these drivers continue to evolve, the market for sag correctors is expected to expand, providing essential solutions for maintaining stable and reliable power supplies in an increasingly electrified and digital world.

Government Policies are Likely to Propel the Market

Renewable Energy Integration Incentives

Governments worldwide are increasingly recognizing the importance of renewable energy sources in mitigating climate change and reducing reliance on fossil fuels. As part of their commitment to sustainability, many governments have implemented policies aimed at promoting the adoption of renewable energy technologies. One significant government policy in the global sag corrector market is the provision of incentives and subsidies for the integration of sag correctors within renewable energy systems. In many regions, renewable energy installations are required to maintain stable voltage levels, especially in the case of intermittent sources like wind and solar power. Voltage sags can disrupt the grid and hinder the efficient operation of these systems. To incentivize the integration of sag correctors, governments offer tax credits,

grants, or reduced permitting fees to renewable energy projects that include these devices in their infrastructure. This policy not only encourages the use of sag correctors but also contributes to the reliability and grid stability necessary for a successful transition to renewable energy sources.

Power Quality Regulations

Governments play a crucial role in ensuring the reliability and quality of electrical power supplied to consumers and industries. To address power quality issues, many governments have established comprehensive regulations and standards that mandate the use of sag correctors in specific applications and industries. For instance, regulations often require the installation of sag correctors in healthcare facilities, data centers, and critical manufacturing processes to minimize downtime and equipment damage caused by voltage sags. Additionally, utilities may be subject to penalties or fines for failing to meet specified power quality standards. These regulations create a strong incentive for businesses and utilities to invest in sag correctors to remain compliant and avoid financial penalties.

Grid Modernization Initiatives

Aging electrical infrastructure and the need for enhanced grid reliability have prompted governments to launch grid modernization initiatives. These initiatives aim to upgrade power transmission and distribution systems, making them more resilient and adaptable to the changing energy landscape. As part of grid modernization efforts, governments often allocate funds and incentives to utilities and grid operators for the deployment of advanced technologies, including sag correctors. By bolstering grid stability and minimizing power disruptions, sag correctors are seen as critical components of these initiatives. Consequently, governments may offer grants, low-interest loans, or other financial incentives to encourage utilities to incorporate sag correctors into their modernization plans.

Research and Development Grants

Governments recognize the importance of technological advancement in improving power quality and grid reliability. To encourage innovation in the field of sag correctors and related power quality solutions, many governments offer research and development (R&D) grants and subsidies to companies and research institutions. These grants support the development of more efficient and cost-effective sag corrector technologies. By investing in R&D, governments aim to stimulate domestic innovation, create high-

tech jobs, and maintain a competitive edge in the global market. The availability of government-funded R&D grants fosters collaboration between academia and industry, driving continuous improvements in sag corrector performance and capabilities.

Export Promotion and Trade Agreements

Governments also play a role in facilitating the international trade of sag correctors. To support domestic sag corrector manufacturers and exporters, governments may engage in trade promotion activities and negotiate favorable trade agreements. Export promotion efforts can include trade missions, participation in international trade shows, and financial assistance for market research and marketing activities. Additionally, governments may negotiate trade agreements that reduce tariffs and trade barriers, making it easier for domestic sag corrector manufacturers to access global markets.

Environmental Regulations and Sustainability Standards

In the pursuit of environmental sustainability, governments worldwide have implemented regulations and standards aimed at reducing energy consumption and promoting energy-efficient technologies. These policies indirectly influence the sag corrector market by encouraging the development and adoption of energy-efficient sag corrector solutions. Government-backed sustainability standards and certifications often drive manufacturers to design sag correctors that meet strict energy efficiency criteria. Compliance with these standards not only demonstrates a commitment to sustainability but also makes sag correctors eligible for government incentives and green procurement programs.

In conclusion, government policies have a significant impact on the global sag corrector market. Policies related to renewable energy integration, power quality regulations, grid modernization, research and development grants, export promotion, and environmental sustainability standards all contribute to the growth and adoption of sag correctors. As governments continue to prioritize energy efficiency, grid reliability, and environmental sustainability, their policies will shape the future of the sag corrector industry.

Key Market Challenges

Technological Advancements and Compatibility

The global sag corrector market faces a significant challenge related to rapid technological advancements and the need for compatibility with evolving power grid

infrastructure. As technology continues to advance, power generation and distribution methods are becoming more sophisticated, with the integration of renewable energy sources, energy storage systems, and smart grid technologies. While these advancements offer numerous benefits, they also introduce complexities in managing power quality and voltage stability, posing challenges for sag corrector manufacturers and users alike. One of the primary issues lies in ensuring that sag correctors remain compatible with the diverse range of power systems and technologies being deployed. As new grid infrastructure is developed and existing systems are upgraded, the requirements for sag correction may change. Ensuring that sag correctors can effectively address voltage sags caused by various sources, including intermittent renewables or load fluctuations, is crucial. This challenge requires ongoing research and development efforts to adapt sag corrector technology to meet the evolving demands of modern power grids. Moreover, as power systems become more digital and interconnected, there is a growing need for intelligent, adaptive sag correctors that can communicate with other grid components and respond dynamically to changing conditions. Achieving seamless interoperability between sag correctors, renewable energy installations, energy storage systems, and grid management software is a complex undertaking that demands significant investment in research, development, and standardization efforts. The challenge of technological advancements and compatibility in the sag corrector market is compounded by the need for backward compatibility with existing grid infrastructure. Many regions still rely on aging power grids that may not readily accommodate advanced sag corrector technologies. Manufacturers must find ways to bridge the gap between legacy systems and cutting-edge solutions, which can be a costly and time-consuming endeavor. Addressing this challenge requires close collaboration between sag corrector manufacturers, grid operators, and regulatory authorities to develop standardized solutions that are adaptable to various grid configurations. Industry standards and guidelines must also keep pace with technological advancements to ensure the seamless integration of sag correctors into evolving power systems.

Cost and Return on Investment (ROI)

Another significant challenge facing the global sag corrector market is the cost of implementing sag correction solutions and demonstrating a favorable return on investment (ROI) for potential users. While sag correctors are essential for maintaining power quality and preventing costly disruptions, the initial investment required to purchase, install, and maintain these devices can be a barrier to adoption for some businesses and utilities. The cost of sag correctors can vary widely depending on their capacity, features, and technology. High-capacity sag correctors equipped with

advanced monitoring and control capabilities tend to be more expensive. For smaller businesses and organizations, especially in developing regions, these costs can be prohibitive, making it difficult for them to access the benefits of sag correction. To overcome this challenge, sag corrector manufacturers must focus on cost optimization, exploring ways to reduce production costs while maintaining or improving performance and reliability. This may involve innovations in materials, manufacturing processes, or the use of more cost-effective components. Demonstrating a favorable ROI is another key challenge. Businesses and utilities need to justify the investment in sag correctors based on tangible benefits such as reduced downtime, extended equipment lifespan, and improved productivity. Quantifying these benefits and projecting long-term cost savings can be complex, as they depend on various factors, including the specific application, the severity of voltage sags, and the cost of downtime. Additionally, the ROI for sag correctors may not always be immediately apparent, leading potential users to prioritize other investments with more immediate paybacks. To address this challenge, sag corrector manufacturers and industry associations should collaborate to develop standardized methods for calculating and communicating ROI, making it easier for businesses and utilities to assess the economic viability of sag correction solutions.

In conclusion, the challenges facing the global sag corrector market include the need to adapt to technological advancements and ensure compatibility with evolving power grid infrastructure, as well as addressing cost barriers and demonstrating a compelling ROI for potential users. Overcoming these challenges requires ongoing innovation, standardization efforts, and effective communication of the long-term benefits of sag correction solutions. As power systems continue to evolve, the sag corrector market must remain flexible and responsive to meet the changing needs of the energy sector.

Segmental Insights

Less than 25A Insights

The Less than 25A segment had the largest market share in 2022 & expected to maintain it in the forecast period. A significant portion of the global electricity consumption occurs in residential and small commercial settings. In these environments, there is a demand for sag correctors to protect sensitive electronic equipment, such as home computers, televisions, refrigerators, and HVAC systems, from voltage sags and power disturbances. The relatively lower Amp Rating of 'Less than 25A' is sufficient for these applications, making them the most common use case for sag correctors. Sag correctors with lower Amp Ratings tend to be more affordable and accessible to a broader range of consumers, including homeowners and small

business owners. This affordability encourages adoption among a larger customer base. In contrast, higher Amp Rating sag correctors can be significantly more expensive and are typically deployed in larger industrial or commercial settings, limiting their prevalence in terms of the number of installations. With the proliferation of electronic devices in homes and small businesses, there is a growing need to protect these devices from voltage sags. Even minor sags can cause data loss, damage electronic components, and disrupt daily activities. As a result, homeowners and small business owners are more likely to invest in sag correctors with lower Amp Ratings to safeguard their electronics. Due to the sheer volume of residential and small commercial installations worldwide, the market for sag correctors in the 'Less than 25A' category is substantial. This large market volume contributes to the dominance of this Amp Rating category in terms of the number of units sold. Consumers in residential and small commercial settings are often more aware of the risks associated with voltage sags and power quality issues. They may be more inclined to proactively seek out solutions like sag correctors to protect their investments in electronic equipment.

Single Phase (L-N) Insights

The Single Phase (L-N), segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. Single-phase (L-N) wiring is the standard configuration for residential and small commercial electrical systems in many regions worldwide. This wiring type is well-suited for supplying power to common household and small business appliances and equipment, making it the most prevalent electrical connection in these settings. As a result, sag correctors designed for single-phase (L-N) applications are in high demand to protect the sensitive electronics found in homes and small businesses. Residential consumers and small businesses represent a vast and diverse market for sag correctors. Nearly every household and small business relies on electronic devices such as computers, televisions, refrigerators, and home entertainment systems. Voltage sags can disrupt the operation of these devices, leading to data loss, equipment damage, and inconvenience. To safeguard their investments and maintain uninterrupted power supply, homeowners and small business owners often opt for single-phase (L-N) sag correctors. Single-phase (L-N) sag correctors are typically more affordable and readily accessible to a broader range of consumers. This affordability encourages adoption among a larger customer base. Given that voltage sags are a common power quality issue in residential areas, the cost-effective nature of these sag correctors makes them an attractive solution. Consumers in residential and small commercial settings are often more aware of power quality issues and the importance of protecting their electronic devices. They may proactively seek out sag correctors to prevent potential damage and inconvenience caused by voltage sags. This

heightened awareness drives demand for single-phase (L-N) sag correctors. In addition to protecting general electronics, single-phase (L-N) sag correctors are crucial for preserving power quality in critical residential applications. For example, in healthcare settings, where medical equipment and life-support systems rely on a stable power supply, the use of sag correctors is vital to ensure patient safety and wellbeing. Due to the sheer volume of residential and small commercial installations globally, the market for single-phase (L-N) sag correctors is substantial. The sheer number of these installations contributes significantly to the dominance of this wiring type in terms of the number of units sold.

Regional Insights

North America had the largest market for sag correctors in 2022. The region is expected to continue to dominate the market during the forecast period, owing to the growing demand for reliable and uninterrupted power supply in various industries, such as manufacturing, healthcare, and IT. The United States is the major market for sag correctors in North America.

Europe had the second-largest market for sag correctors in 2022. The market in Europe is expected to grow at a CAGR of 6.2% during the forecast period, driven by the increasing demand for sag correctors in the manufacturing and healthcare industries. Germany, France, and the United Kingdom are the major markets for sag correctors in Europe.

Asia Pacific is projected to be the fastest-growing market for sag correctors, with a high CAGR during the forecast period. The growth of the market in Asia Pacific is driven by the growing economic development in the region, which is leading to increased demand for reliable and uninterrupted power supply. China, India, and Japan are the major markets for sag correctors in Asia Pacific.

Key Market Players

ABB Ltd

Schneider Electric SE

Eaton Corporation plc

Siemens AG

GE Industrial Solutions

Delta Electronics Inc

SoftSwitching Technologies Corporation

Shenzhen Sinexcel

Report Scope:

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

Sag Corrector Market, By Amp Rating:

Less than 25A

26A-110A

111A-400A

More than 400A

Sag Corrector Market, By Line Voltage:

Less than 220VAC

221VAC-415VAC

More than 416VAC

Sag Corrector Market, By Wiring Type:

Single Phase(L-L)

Single Phase (L-N)

Three Phase (3-Wire)

Three Phase (4-Wire)

Sag Corrector Market, By Application:

Data Center

Robotics & Machinery

Pharmaceuticals & Medicals

Sag Corrector Market, By Region:

North America

United States

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

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Sag Corrector Market.

Available Customizations:

Global Sag Corrector market report with the given market data, Tech Sci Research

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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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