

# **Synchronous Generator Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Prime Mover (Steam Turbine and Gas Turbine), By Speed (1,500 RPM and 3,000 RPM), By Power Rating (2-5 MVA, 10-20 MVA, 20-30 MVA, & 30-50 MVA), By End User (Hospitals, Data Centers, Telecommunications Networks, Residential and Others), By Region, By Competition Forecast & Opportunities, 2018-2028F**

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## **Abstracts**

Global Surge Arresters Market was valued at USD 1.26 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.09% through 2028.

Surge arresters are essential protective devices widely utilized to prevent damage caused by voltage fluctuations. These arresters work by discharging or bypassing surge currents, providing protection against direct lightning strikes and induced surges.

Additionally, surge arresters offer reliable protection, making them extensively used and driving the global surge arrester market. Surge arresters find applications in both direct and indirect connections.

### **Key Market Drivers**

#### **Increasing Demand for Reliable Power Supply**

A key driver in the Global Surge Arresters Market is the growing demand for a reliable and uninterrupted power supply. In today's digital age, industries, businesses, and households heavily rely on electricity to function efficiently. Any disruption in power

supply, whether caused by lightning strikes, switching operations, or grid faults, can result in significant downtime, damage to electrical equipment, data loss, and financial losses.

The proliferation of sensitive electronic devices in various sectors, including telecommunications, IT, manufacturing, and healthcare, necessitates robust protection against voltage surges. Surge arresters play a vital role in safeguarding these devices by diverting excess voltage to the ground, thereby preventing costly damage and downtime.

The increasing adoption of automation and Industry 4.0 practices in the manufacturing and industrial sectors places a premium on power quality and reliability. Surge arresters ensure that critical manufacturing processes and automation systems remain operational, reducing the risk of production stoppages and improving overall productivity.

### Growth in Renewable Energy Generation

The increase in renewable energy generation, such as solar and wind power, serves as a significant driver in the Global Surge Arresters Market. Renewable energy installations, often situated in remote areas, are vulnerable to lightning strikes and voltage transients.

Solar photovoltaic (PV) systems are exposed to the elements and face the risk of lightning strikes and transient voltage spikes. Surge arresters are utilized to safeguard solar panels, inverters, and associated electrical components, ensuring the longevity and efficiency of these systems.

Wind turbines are frequently installed in open areas where lightning strikes are prevalent. Surge arresters protect wind turbine generators, electrical cabinets, and sensitive control systems from voltage surges, minimizing downtime and maintenance costs.

The integration of renewable energy sources into the electrical grid adds complexity to grid management. Surge arresters contribute to maintaining the stability and reliability of the grid by preventing surges from impacting grid infrastructure and other connected assets.

### Aging Electrical Infrastructure

Numerous regions worldwide are currently grappling with the challenge of aging electrical infrastructure. The deterioration of power distribution systems, including overhead lines, substations, and transformers, significantly increases vulnerability to voltage surges. Consequently, the demand for surge arrester installation and replacement has witnessed substantial growth.

Governments and utilities are making investments in the modernization of their electrical infrastructure to enhance reliability and safety. Surge arresters constitute an integral part of this modernization effort, offering a cost-effective means to safeguard aging assets from voltage surges.

The process of rapid urbanization and the expansion of electrical grids into new areas necessitate the development of new infrastructure. In such contexts, surge arresters assume a critical role in protecting newly deployed equipment and averting outages in burgeoning urban centers. Furthermore, the escalating frequency and intensity of weather events associated with climate change, such as thunderstorms and hurricanes, heighten the risk of voltage surges. Surge arresters are indispensable in safeguarding electrical infrastructure in regions prone to extreme weather conditions.

In conclusion, the Global Surge Arresters Market is driven by the imperative need for a dependable power supply, the growth of renewable energy generation, and the modernization of aging electrical infrastructure. As industries increasingly rely on electricity and the energy landscape continues to evolve, surge arresters play an indispensable role in ensuring the protection, reliability, and resilience of electrical systems.

## Key Market Challenges

### Rapid Technological Advancements and Product Obsolescence

One of the significant challenges in the Global Surge Arresters Market is the rapid pace of technological advancements and the subsequent risk of product obsolescence. Surge arrester technologies are continuously evolving to meet the demands of modern electrical systems and provide more effective protection against voltage surges.

With each technological leap, the lifespan of surge arresters may be reduced as newer, more advanced models are introduced. This poses a challenge for manufacturers as they must consistently invest in research and development to remain competitive in the

market.

Upgrading or replacing surge arresters can result in compatibility issues within existing electrical systems. Older arresters may not be interchangeable with newer models, necessitating adjustments to the system and potentially increasing costs.

The surge arrester market is saturated with a wide range of products from various manufacturers. This saturation can make it challenging for consumers to navigate the options and select the most suitable product for their specific needs, leading to potential confusion and decision-making challenges.

### Cost and Budget Constraints

Cost and budget constraints pose significant challenges in the Global Surge Arresters Market. The installation of surge arresters can be capital-intensive, especially for large-scale electrical systems and infrastructure projects.

The cost of purchasing and installing surge arresters can be substantial, particularly for utilities, industrial facilities, and infrastructure projects. Budget constraints may limit organizations' ability to invest in comprehensive surge protection measures. In addition to the initial investment, surge arresters require periodic maintenance and testing to ensure ongoing effectiveness. These ongoing costs can strain budgets, particularly for organizations with limited resources.

While some organizations may prioritize cost savings, it is important to consider the potential trade-off. Choosing to save costs can leave electrical systems vulnerable to voltage surges, potentially resulting in equipment damage, downtime, and higher long-term costs.

### Key Market Trends

#### Adoption of Smart and IoT-Enabled Surge Arresters

A prominent trend observed in the Global Surge Arresters Market is the growing adoption of smart and Internet of Things (IoT)-enabled surge arresters. These advanced surge protection devices are equipped with sensors, communication capabilities, and data analytics features, effectively transforming them into intelligent components within electrical systems.

Smart surge arresters continuously monitor real-time electrical parameters, such as voltage levels and surge events. The collected data is then transmitted to central control systems or cloud platforms, providing operators with immediate insights into the health of the electrical network.

By leveraging IoT technology, surge arresters with predictive maintenance capabilities can analyze historical data and performance trends to anticipate maintenance or replacement requirements. This predictive approach reduces downtime and extends the lifespan of surge protection systems.

Furthermore, operators can remotely control and configure smart surge arresters, enabling real-time adjustments to protection settings. This feature proves particularly valuable in rapidly changing electrical environments or during extreme weather conditions when surge risks are heightened.

Integrating smart surge arresters into smart grid deployments contributes to grid stability and reliability. These devices provide valuable data on power quality and surge events, empowering utilities to make informed decisions and respond to incidents more effectively.

### Emphasis on Sustainable and Environmentally Friendly Surge Arresters

Sustainability and environmental concerns are driving a growing trend towards the adoption of more eco-friendly surge arresters in the Global Surge Arresters Market. Manufacturers are increasingly focusing on reducing the environmental impact of their products and ensuring compliance with green standards.

Surge arresters are being designed in accordance with the Restriction of Hazardous Substances (RoHS) directive to minimize the use of hazardous materials. This not only enhances safety for the environment and human health but also promotes regulatory compliance.

Manufacturers are actively exploring the utilization of recyclable and environmentally friendly materials in surge arrester construction. This approach significantly reduces the environmental footprint of the products and contributes to long-term sustainability goals.

Surge arresters are being optimized for improved energy efficiency. By reducing power consumption, these solutions effectively lower operating costs and align with sustainability objectives by curbing energy-related greenhouse gas emissions.

Some manufacturers are conducting comprehensive lifecycle assessments of their surge arresters to quantify their environmental impact throughout the entire product lifecycle, from production to disposal. This valuable information enables informed decisions regarding design and material choices.

The Global Surge Arresters Market is experiencing notable trends related to the adoption of smart and IoT-enabled surge arresters, customization for specific applications and industries, and a growing emphasis on sustainability and environmental friendliness. These trends reflect the evolving requirements of electrical systems across various sectors and the industry's unwavering commitment to providing reliable, efficient, and environmentally responsible surge protection solutions.

## Segmental Insights

### Type Insights

The Polymeric segment is expected to dominate the market during the forecast period. The polymeric segment in the Global Surge Arresters Market is a significant category that reflects a growing surge arrester technology trend. Surge arresters in this segment are primarily constructed using polymeric materials, such as silicone rubber or ethylene propylene diene monomer (EPDM). Polymeric surge arresters are primarily composed of silicone rubber or EPDM, both of which are renowned for their excellent electrical insulating properties, weather resistance, and durability. These materials offer effective protection against voltage surges.

Additionally, polymeric surge arresters are generally more compact and lightweight compared to their porcelain counterparts. This characteristic facilitates easier handling, transportation, and installation, resulting in reduced installation time and costs. Moreover, polymeric surge arresters are extensively employed in medium and high-voltage electrical grids and substations, safeguarding transformers, switchgear, and other vital equipment from voltage surges caused by lightning strikes or switching operations. Notably, polymeric surge arresters entail low maintenance requirements compared to porcelain surge arresters. They are less susceptible to surface contamination and do not necessitate regular cleaning, thereby reducing operational costs.

Furthermore, the polymeric materials utilized in these arresters exhibit high resistance to corrosion, making them suitable for outdoor and coastal applications where exposure



to harsh environmental conditions is common. Manufacturers continue to invest in research and development to enhance the electrical and thermal properties of advanced polymer materials. These ongoing innovations aim to further augment the performance and longevity of polymeric surge arresters.

### Application Insights

The utility segment is expected to dominate the market during the forecast period. The utility segment in the Global Surge Arresters Market constitutes a substantial portion of the market and plays a crucial role in ensuring the reliable and uninterrupted supply of electricity to consumers. Surge arresters utilized in the utility segment are specifically designed to handle high voltage levels, typically ranging from 6 kV (kilovolts) to 765 kV or even higher. These high voltage ratings are essential for safeguarding utility substations and transmission lines. Surge arresters deployed in utility substations provide protection to transformers, circuit breakers, and other substation equipment against voltage surges caused by lightning strikes or switching operations. They are indispensable for maintaining grid reliability.

Utility-grade surge arresters are strategically installed along transmission lines to mitigate voltage surges from propagating through the grid, thereby reducing the risk of cascading failures and blackouts. Surge arresters enhance the reliability of electrical grids by preventing equipment damage or disruptions in power supply caused by voltage surges. This is of utmost importance for utilities, as it enables them to sustain a stable and uninterrupted flow of electricity to consumers. By safeguarding substation equipment, transmission lines, and transformers, surge arresters help minimize downtime and operational disruptions, thereby ensuring a reliable power supply to industries and households.

In the utility segment, surge arresters are increasingly adopting advanced monitoring and analytics capabilities, making them smarter. Utilities are deploying sensor-equipped arresters to gather data on voltage surges, arrester health, and grid performance, enabling proactive maintenance and grid optimization. Surge arresters are also being integrated into smart grid deployments, allowing utilities to collect real-time data on grid conditions and respond more effectively to surge events.

### Regional Insights

Asia Pacific emerged as the dominant region in the Global Surge Arresters Market in 2022. The region is currently undergoing extensive infrastructure development,

encompassing the construction of new power generation facilities, transmission lines, and substations. Surge arresters play a critical role in these projects by safeguarding vital electrical infrastructure.

The Asia-Pacific region is experiencing remarkable growth in renewable energy installations, particularly in the solar and wind power sectors. Surge arresters are of utmost importance in protecting solar panels, wind turbines, and associated electrical equipment from lightning strikes and transient voltage spikes.

The Asia-Pacific region faces a growing energy demand driven by population growth, industrialization, and economic development. This heightened energy consumption places a greater burden on electrical grids, underscoring the indispensable nature of surge arresters in maintaining grid stability.

The Asia-Pacific region is prone to a variety of climate-related events, such as typhoons, monsoons, and thunderstorms. Consequently, there is a rising demand for surge arresters capable of withstanding extreme weather conditions to safeguard electrical infrastructure from lightning strikes and associated surges.

Governments in the Asia-Pacific region are increasingly prioritizing electrical safety standards and regulations. Surge arresters must adhere to these standards to ensure the protection of critical infrastructure and the safety of consumers. The Asia-Pacific region is witnessing the integration of IoT technology into various sectors, further emphasizing the relevance of surge arresters with IoT capabilities for remote monitoring and predictive maintenance in this technologically advanced environment.

### Key Market Players

ABB Ltd.

CG Power and Industrial Solutions Ltd

Eaton Corporation PLC

Emerson Electric Co.

Legrand SA

Siemens AG



Mitsubishi Electric Corporation

Raycap Corporation SA

Schneider electric SE

General Electric Company

Report Scope:

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

Surge Arresters Market, By Type:

Porcelain

Polymeric

Surge Arresters Market, By Class:

Station Class

Intermediate Class

Distribution Class

Surge Arresters Market, By Voltage Level:

High

Medium

Low

Surge Arresters Market, By Application:

Utility

Industrial

Surge Arresters 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

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Surge Arresters Market.

### Available Customizations:

Global Surge Arresters market report with the given market data, Tech Sci 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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