

European Low-Voltage Switchgear Markets

Description: This research titled European Low-voltage Switchgear Markets estimates the size and growth of the market in Western Europe from 2007-2017. It analyses the competitive structure of the market and examines important product and geographic trends. In this research, Frost & Sullivan's expert analysts thoroughly examine the following product segments: miniature circuit breakers (MCB), air circuit breakers (ACB), moulded case circuit breakers (MCCB) and contactors.

Market Overview

Increased Industrial Activity to Boost Demand for Low-voltage Switchgears

The mature European low-voltage (LV) switchgear market is facing a serious challenge in the form of fluctuating raw material prices. However, market growth is set to be sustained by an increase in industrial activity and investments in smart grids. During the first half of 2010, industrial investments amounted to about \$3.70 billion. The rapid recovery of the export manufacturing sector has resulted in heightened demand from manufacturing-focussed countries like Germany, France, and Italy. "Key IEC export markets like Africa, the Middle East, and Russia are experiencing increased industrial activity, mainly in the oil and gas industry," notes the analyst of this research. "This will trigger greater demand for LV switchgears."

Another significant market catalyst has been expanding smart grid installations across Europe. This is motivating the development of intelligent switchgear. Providing smart electrical equipment for network upgrades will be a major driver during the forecast period. Several countries (Denmark, Sweden, and Italy) have adopted smart meters, others (the United Kingdom, Ireland, France, and Spain) have mandates to deploy smart meters, while, in still others, smart meter penetration (primarily, Nordic countries) has reached half of the total meter market. LV switchgear manufacturers are in for a windfall as Europe moves towards achieving smart grid deployment. Concurrently, they are set to benefit from the increasing automation of industrial processes. "The enhanced need for intelligence in energy distribution, particularly in industrial applications, will boost the power management capabilities of the consumer," explains the analyst. "Hence, incorporating intelligent LV switchgear components in power distribution will be an important market driver throughout the forecast period."

Manufacturers to Focus on Expanding Product Portfolios

While such trends bode well for revenue growth, a major dampener has been the surging prices of key raw materials, such as copper and aluminium. This has placed pressure on manufacturers to hike the price of their equipment in order to be profitable.

"A critical challenge for product manufacturers in the future will be to widen their product portfolios and address the application needs of a diverse spectrum of end-user segments," concludes the analyst. "For instance, renewable power generation and smart grid installations have varied needs based on size, automation requirements, and operational functions – these needs will have to be successfully addressed."

Market Sectors

Expert Frost & Sullivan analysts thoroughly examine the following product segments in this research:

- Miniature circuit breakers (MCB)
- Air circuit breakers (ACB)
- Moulded case circuit breakers (MCCB)
- Contactors

By Geographical Region

- United Kingdom and Ireland
- Germany
- France
- Italy

- Spain
- Rest-of-Europe (ROE)

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