

Middle East & Africa Lightning Arrester Market Segmented By Material (Polymeric and Porcelain), By Voltage Rating (Below 35 KV, 35-110 KV and Above 110 KV), By Class (Transmission Line, Substation and Distribution Line), By Country, By Competition Forecast & Opportunities, 2018-2028

Market Report | 2023-11-07 | 122 pages | TechSci Research

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Report description:

Middle East & Africa Lightning Arrester Market has valued at USD 681.93 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.25% through 2028. The demand for electricity is increasing in the Middle East and Africa as a result of population growth and economic development. Consequently, there is a requirement to expand power generation and transmission infrastructure, thereby highlighting the necessity of lightning protection solutions to safeguard these critical assets.

Key Market Drivers

Increasing Urbanization and Infrastructure Development

The Middle East & Africa Lightning Arrester Market is witnessing substantial growth due to several key drivers, with one of the most significant being the increasing urbanization and infrastructure development in the region. As countries in the Middle East and Africa continue to urbanize and modernize their cities, the importance of reliable electrical infrastructure becomes paramount.

With the rapid expansion of urban areas, there is a rising demand for electricity to power residential, commercial, and industrial establishments. This surge in electrical consumption highlights the critical need to protect the essential infrastructure from lightning strikes, which can cause severe damage and downtime. Lightning arresters play a crucial role in safeguarding electrical systems, ensuring uninterrupted power supply to meet the increasing demands of urban populations.

Moreover, infrastructure development initiatives such as the construction of high-rise buildings, industrial facilities, and transportation networks necessitate advanced electrical systems capable of withstanding lightning strikes. This has led to a greater adoption of lightning arresters in construction projects across the Middle East and Africa. These lightning protection

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systems are indispensable in ensuring the safety of people, property, and assets, thereby driving the demand for lightning arresters in the region.

Furthermore, governments and regulatory bodies in the Middle East and Africa are taking measures to enforce lightning protection standards, making it mandatory for buildings and critical infrastructure to implement lightning protection systems. This regulatory push further propels the growth of the lightning arrester market, as compliance becomes a priority for both public and private entities involved in infrastructure development.

In conclusion, the increasing urbanization and infrastructure development in the Middle East and Africa are propelling the lightning arrester market forward. The need to safeguard critical infrastructure, comply with regulations, and ensure uninterrupted power supply in rapidly growing urban areas is driving the demand for lightning arresters, making them an integral component of modern electrical systems.

Growing Awareness of Lightning Safety

Another important factor driving the Middle East & Africa Lightning Arrester Market is the increasing awareness of lightning safety. Lightning, a natural phenomenon, can have devastating consequences when it occurs unexpectedly. In regions like the Middle East and Africa, where thunderstorms and lightning strikes are relatively common, there is a growing recognition of the necessity to safeguard lives, property, and assets from the destructive power of lightning.

As awareness of the dangers of lightning continues to grow, individuals, businesses, and government agencies are taking proactive measures to mitigate the risks associated with lightning strikes. Lightning arresters are considered a vital component of lightning protection systems, and their adoption is on the rise as people become more educated about lightning safety.

One of the key drivers behind this awareness is the availability of information through various channels, including media, government campaigns, and educational institutions. Public awareness campaigns stress the importance of lightning protection for homes, schools, hospitals, and critical infrastructure. Consequently, homeowners and facility managers are increasingly investing in lightning protection solutions, including lightning arresters.

Furthermore, insurance companies in the Middle East and Africa are promoting lightning protection as a means of risk mitigation. Many insurance policies now offer discounts or lower premiums to properties equipped with lightning protection systems, including lightning arresters. This financial incentive encourages property owners to install lightning protection, further bolstering the lightning arrester market.

Moreover, businesses and industries are recognizing the potential economic losses that can result from lightning-related downtime and equipment damage. To safeguard their operations, they are investing in comprehensive lightning protection solutions that encompass lightning arresters.

In conclusion, the increasing awareness of lightning safety in the Middle East and Africa is a significant driver for the lightning arrester market. As individuals, businesses, and institutions become more knowledgeable about the risks associated with lightning strikes, the demand for lightning protection systems, including lightning arresters, is expected to continue to rise.

Expansion of Renewable Energy Projects

The proliferation of renewable energy projects serves as a pivotal catalyst for the Middle East and Africa Lightning Arrester Market. The region is witnessing a substantial transition towards renewable energy sources, namely solar and wind power, in order to meet escalating energy demands, curtail carbon emissions, and diversify their energy portfolios.

Renewable energy projects encompass a comprehensive electrical infrastructure, comprising transmission lines, substations, and power generation facilities. These installations are susceptible to lightning strikes, which can disrupt energy production and result in costly downtime. Lightning arresters play a vital role as integral components of lightning protection systems, safeguarding these critical assets.

The Middle East and Africa possess abundant solar resources, rendering them optimal sites for solar power projects. As regional governments incentivize and invest in renewable energy initiatives, the construction of solar farms has experienced a surge. Consequently, the demand for lightning arresters has risen, ensuring the protection of solar panels, inverters, and essential electrical equipment required for solar energy generation.

Similarly, wind energy projects have gained momentum in the region, particularly along coastlines and areas with favorable wind conditions. Due to their height and exposure, wind turbines and associated electrical infrastructure are susceptible to lightning strikes. To ensure safety and uninterrupted operation, lightning arresters are deployed in these wind energy installations.

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Moreover, the expansion of renewable energy projects aligns with global sustainability objectives, attracting international investments and partnerships. As these projects continue to expand in scale and number, the necessity for robust lightning protection systems, including lightning arresters, becomes increasingly apparent.

In conclusion, the expansion of renewable energy projects in the Middle East and Africa plays a pivotal role in driving the lightning arrester market. The critical infrastructure associated with solar and wind energy generation necessitates protection from lightning strikes to ensure uninterrupted and sustainable energy production, solidifying the indispensable role of lightning arresters within these burgeoning industries.

Key Market Challenges

Economic Constraints and Budget Limitations

One of the significant challenges facing the Middle East & Africa Lightning Arrester Market is economic constraints and budget limitations. While the region is witnessing growth in various industries, many countries still struggle with economic instability, fiscal deficits, and limited financial resources. These economic challenges can impede investments in crucial infrastructure, including lightning protection systems.

In numerous parts of the Middle East and Africa, governments and businesses may prioritize other essential needs such as healthcare, education, and basic infrastructure over lightning protection measures. This prioritization often results in limited funding allocated for lightning arresters and related equipment. Consequently, many existing structures and new construction projects remain vulnerable to lightning strikes, leading to costly damages and downtime.

Moreover, the high cost of quality lightning protection systems, including lightning arresters, can act as a barrier to their widespread adoption. The initial investment required for comprehensive lightning protection can strain budgets, particularly for smaller businesses and residential property owners. This financial constraint can result in compromised lightning protection measures or, in some cases, a complete lack of protection.

To tackle this challenge, stakeholders in the Middle East & Africa Lightning Arrester Market, including governments, industry associations, and manufacturers, need to explore cost-effective solutions and financial incentives that facilitate the accessibility of lightning protection. This may involve subsidies, tax incentives, or financing options to encourage investment in lightning protection systems despite budget limitations.

Lack of Awareness and Education

One of the significant challenges facing the Middle East & Africa Lightning Arrester Market is the lack of awareness and education regarding lightning risks and the crucial role of lightning protection. Many individuals, businesses, and even some construction professionals lack sufficient knowledge about the potential dangers of lightning strikes and the importance of lightning arresters in mitigating these risks.

In certain instances, there exists a misconception that lightning strikes are rare occurrences, which leads to a lack of urgency in implementing lightning protection measures. This lack of awareness can result in inadequate lightning protection or, even worse, no protection at all, leaving people and property vulnerable to lightning-related damage and accidents.

Furthermore, the absence of standardized lightning protection regulations and enforcement in certain regions of the Middle East and Africa exacerbates the problem. Without clear guidelines and mandates, property owners and builders have less incentive to invest in lightning protection systems, including lightning arresters.

Addressing this challenge requires a comprehensive approach. Public awareness campaigns, educational initiatives, and training programs can effectively disseminate information about lightning risks and the benefits of lightning protection. Governments and regulatory bodies should also consider implementing and enforcing lightning protection standards to ensure the safety of individuals and property.

Harsh Environmental Conditions

The Middle East & Africa Lightning Arrester Market encounters a distinctive challenge due to the harsh environmental conditions prevailing in many regions. These conditions encompass extreme temperatures, sandstorms, high humidity, and corrosive atmospheres, all of which can significantly impact the performance and durability of lightning protection systems, including lightning arresters.

The detrimental effects of extreme heat and UV radiation on the materials used in lightning protection systems can potentially diminish their efficacy over time. The accumulation of sand and dust from frequent desert storms can hinder the ability of

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lightning arresters to safely conduct lightning currents to the ground. Moreover, high humidity levels can contribute to corrosion, compromising the structural integrity of lightning protection components.

Furthermore, certain areas in the Middle East and Africa are prone to saline environments near coastal regions, thereby exacerbating the risk of corrosion for metallic lightning protection systems.

To tackle this challenge, manufacturers must develop lightning protection solutions that are specifically engineered to withstand the harsh environmental conditions of the region. Regular maintenance and inspections of lightning protection systems are imperative to ensure their sustained effectiveness in such demanding settings. Building owners and operators should remain cognizant of the environmental factors that can impact lightning protection systems and adopt measures to mitigate these effects.

In conclusion, the Middle East & Africa Lightning Arrester Market faces challenges related to economic constraints, lack of awareness and education, and harsh environmental conditions. Overcoming these challenges necessitates collaborative efforts among governments, industry stakeholders, and the public to advocate for the importance of lightning protection, allocate resources efficiently, and devise solutions that can endure the region's unique environmental conditions.

Key Market Trends

Adoption of Advanced Materials and Technologies

One notable trend observed in the Middle East & Africa Lightning Arrester Market is the growing adoption of advanced materials and technologies. Lightning arresters are evolving to enhance efficiency and reliability in safeguarding against lightning strikes. While traditional lightning arresters predominantly relied on metal oxide varistor (MOV) technology, advancements in materials science and technology have paved the way for the development of newer and improved alternatives.

An important development is the utilization of advanced polymers and composites in lightning arrester construction. These materials offer distinct advantages such as heightened durability, resistance to harsh environmental conditions, and lighter weight, thereby facilitating easier installation and maintenance. Moreover, they provide enhanced protection against lightning-induced surges.

Another significant technological trend involves the integration of smart and IoT (Internet of Things) capabilities into lightning protection systems. These innovative features enable real-time monitoring and remote diagnostics of lightning arresters. Maintenance teams can promptly receive alerts and data pertaining to the health and performance of lightning protection systems. This proactive approach to maintenance helps minimize downtime and aligns with the broader trend of digitalization and modernization of infrastructure in the Middle East and Africa.

Incorporating these advanced materials and technologies not only improves the reliability of lightning arresters but also aligns with the broader trend of digitalization and modernization of infrastructure in the Middle East and Africa.

Increasing Demand for Renewable Energy Lightning Protection

As the adoption of renewable energy sources continues to increase in the Middle East and Africa, there is a noticeable trend towards higher demand for lightning protection solutions tailored to the renewable energy sector. Particularly, solar farms and wind turbines are prone to lightning strikes due to their height and exposure in open areas.

This trend is driving the development of specialized lightning protection systems designed to safeguard renewable energy installations. Lightning arresters, surge protection devices, and grounding systems are becoming integral components of solar and wind farm infrastructure. These systems are designed to prevent lightning-induced damage to solar panels, wind turbines, and associated electrical equipment, ensuring uninterrupted energy generation.

Furthermore, regulatory bodies and industry associations are progressively recognizing the significance of lightning protection for renewable energy projects. They are implementing standards and guidelines to address this specific need. This trend aligns with the region's efforts to expand its renewable energy capacity and achieve sustainability goals.

Segmental Insights

Voltage Rating Insights

The Above 110 kV segment emerged as the dominant player in 2022. Countries in the Middle East & Africa are making investments in expanding and modernizing their electricity grids to meet the growing demand. The Above 110 kV segment plays a crucial role in ensuring the reliability of high-voltage transmission and distribution systems. Lightning arresters are vital components for safeguarding transformers, substations, and transmission lines against lightning-induced surges.

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Numerous industries in the Middle East & Africa operate high-voltage equipment and systems, making lightning protection indispensable for uninterrupted operations. Sectors like oil and gas, mining, and manufacturing rely on Above 110 kV lightning arresters to shield their high-voltage assets effectively.

Advancements in materials science have greatly benefited lightning arresters in the Above 110 kV segment. The use of high-quality insulating materials and surge protection technologies is imperative for the effectiveness of lightning protection systems in high-voltage applications.

Companies specializing in Above 110 kV lightning arresters have the opportunity to explore export prospects to neighboring countries and regions with similar plans for high-voltage infrastructure expansion. Establishing a strong regional presence can pave the way for international market opportunities.

In conclusion, the Above 110 kV segment of the Middle East & Africa Lightning Arrester Market plays a critical role in protecting high-voltage infrastructure, including electricity grids, renewable energy projects, industrial applications, and grid reliability. Stringent regulations, technological advancements, investment prospects, and export potential all contribute to the growth and significance of this segment in the region.

Class Insights

The Distribution Line segment is projected to experience rapid growth during the forecast period. The Middle East & Africa are currently witnessing substantial population growth and rapid urbanization. This demographic transition has resulted in an increased demand for electricity. Distribution lines play a pivotal role in delivering power to households, businesses, and industries. As the energy demand continues to escalate, the necessity for reliable lightning protection in distribution networks becomes increasingly evident.

Certain regions in the Middle East & Africa frequently experience thunderstorms, posing a significant risk to overhead distribution lines from lightning strikes. Damage caused by lightning strikes can result in extensive power outages and substantial economic losses. Therefore, the presence of lightning arresters is indispensable in mitigating these risks.

Various countries are currently implementing rural electrification initiatives, extending distribution lines to remote and underserved areas. These newly established distribution networks require robust lightning protection systems to withstand challenging environmental conditions and minimize downtime in critical services.

Governments and regulatory bodies in the region are placing an increasing emphasis on safety regulations for electrical infrastructure, including distribution lines. Compliance with these regulations often necessitates the installation of lightning protection systems.

Companies specializing in distribution line lightning arresters can explore export opportunities to neighboring countries in the Middle East & Africa. Exporting to regions with similar infrastructure development plans can prove to be a strategic growth opportunity.

Country Insights

Saudi Arabia emerged as the dominant player in 2022. Saudi Arabia's robust economic growth, driven by its Vision 2030 initiative, is fostering urbanization and infrastructure development. The construction of megaprojects, smart cities, and industrial complexes is on the rise. This expansion brings about an increased demand for lightning protection systems, including lightning arresters, to safeguard these critical assets from lightning strikes.

Furthermore, Saudi Arabia is actively investing in renewable energy projects, such as large-scale solar and wind farms. As the renewable energy sector expands, there is a growing need for specialized lightning protection solutions tailored to these installations. Lightning arresters play a crucial role in ensuring the uninterrupted operation of solar panels, wind turbines, and electrical infrastructure. Saudi Arabia is actively working on implementing and enforcing lightning protection standards and regulations. Compliance with these standards holds increasing significance in construction projects, thereby driving the demand for lightning protection systems. Manufacturers and service providers that meet or exceed these standards are well-positioned in the market.

Moreover, the adoption of advanced materials and smart technologies is on the rise in Saudi Arabia. Lightning arresters equipped with IoT capabilities for real-time monitoring and remote diagnostics are gaining traction. These systems enhance safety and reduce downtime, aligning with the country's technological aspirations. Increasing awareness of lightning risks and the importance of lightning protection is critical in Saudi Arabia. Education campaigns and training programs can help bridge the

knowledge gap and foster a culture of safety. As public awareness grows, the demand for lightning protection systems is likely to increase.

Considering Saudi Arabia's diverse climate and environmental conditions, ranging from desert regions to coastal areas, customized lightning protection solutions are necessary. Manufacturers that offer innovative, tailored solutions designed to withstand the specific challenges of the Saudi environment can gain a competitive edge.

In conclusion, the Middle East & Africa Lightning Arrester Market in Saudi Arabia is characterized by economic development, a growing emphasis on renewable energy, a thriving oil and gas sector, regulatory advancements, technological adoption, increasing awareness, customization requirements, and investment prospects.

Key Market Players

ABB

DEHN Middle East

ERICO (A Pentair Company)

Harger Lightning & Grounding

A.N. Wallis & Co. Ltd

Lightning Protection International

Alconex

Aplicaciones Tecnologicas SA (AT3W)

Lightning Eliminators & Consultants, Inc.

Eaton

Report Scope:

In this report, the Middle East & Africa Lightning Arrester Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□ Middle East & Africa Lightning Arrester Market, By Material:

o □ Polymeric

o □ Porcelain

□ Middle East & Africa Lightning Arrester Market, By Voltage Rating:

o □ Polymeric

o □ Porcelain

□ Middle East & Africa Lightning Arrester Market, By Class:

o □ Transmission Line

o □ Substation

o □ Distribution Line

□ Middle East & Africa Lightning Arrester Market, By Country:

o □ United Arab Emirates

o □ Saudi Arabia

o □ South Africa

o □ Turkey

o □ Qatar

o □ Nigeria

o □ Algeria

o □ Iran

o □ Egypt

o □ Morocco

o □ Rest of MEA

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Middle East & Africa Lightning Arrester Market.

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Available Customizations:

Middle East & Africa Lightning Arrester 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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