

# **Global Data Center Substation Market Size Study and Forecast by Components (Transformers, Switchgears: Air Insulated, Gas Insulated, Relays, Capacitors, Busbar, Surge Protection), by Voltage (33 kV–110 kV, 110 kV–220 kV, 220 kV–500 kV, Above 500 kV), by Channel Partners (OEMs, TSO/DSO), and Regional Forecasts 2026–2036**

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## **Abstracts**

The Global Data Center Substation Market, valued at USD 10.20 Billion in 2025, is anticipated to reach USD 31.95 Billion by 2036, expanding at a 9.9% CAGR during the forecast period. Data center substation market includes electrical infrastructure solutions that deliver reliable, efficient and continuous power transmission and distribution to hyperscale, colocation, enterprise and edge data centers. These substations house transformers, switchgear, relays, capacitors, busbars, surge protection systems and other power management equipment to control voltage, improve power quality and ensure operational continuity. Operators are investing in modern substation infrastructure to support the increased electrical loads associated with the fast growth of cloud computing, artificial intelligence (AI), hyperscale facilities and high-performance computing (HPC), as well as the need to improve energy efficiency and grid reliability as data center power requirements increase. International Energy Agency (IEA, 2024) states that worldwide demand for electricity from digital infrastructure and data centers is increasing, driving investment in robust power transmission and distribution systems.

### **Global Data Center Substation Market: Key Highlights**

The global data center substation market was valued at USD 10.20 billion in

2025 and is projected to reach USD 31.95 billion by 2036, expanding at a CAGR of 9.9% during the forecast period, driven by rising investments in digital infrastructure and high-capacity power distribution systems.

North America dominates the global market owing to substantial investments in hyperscale data centers, rapid cloud infrastructure expansion, modernization of electrical transmission systems, and the presence of leading cloud service providers and colocation operators.

Asia Pacific is expected to register the highest growth during the forecast period, supported by rapid construction of hyperscale facilities, increasing artificial intelligence workloads, expanding digital infrastructure, and growing investments in cloud computing and data center capacity.

Transformers represent the largest component segment due to increasing demand for high-capacity electrical distribution, efficient voltage regulation, reliable power transmission, and continuous operation of hyperscale and enterprise data center facilities.

The 110 kV–220 kV voltage segment remains the largest segment owing to its widespread deployment across large hyperscale and enterprise data centers requiring stable, high-capacity power transmission and efficient electrical distribution infrastructure.

Rapid growth in artificial intelligence workloads is significantly increasing demand for robust power infrastructure capable of supporting high-density computing environments, enhanced electrical reliability, and continuous high-performance data center operations.

Smart substations are improving grid reliability, operational efficiency, real-time monitoring, predictive maintenance, and intelligent energy management through the integration of digital technologies, automation, and advanced communication systems.

Next-generation data center expansion is increasingly supported by sustainable power distribution technologies, including energy-efficient substations, renewable energy integration, intelligent grid management, and advanced electrical infrastructure designed to reduce operational costs and carbon emissions.

## Research Scope & Methodology

This report examines the Global Data Center Substation Market by analyzing the market segmentation by infrastructure development, power transmission technology, hyperscale data center expansion, competitive landscape, and regional market analysis for the forecast period 2025-2036. The study includes substation equipment, electrical components, voltage infrastructure, channel partnerships and deployment trends supporting digital infrastructure across the globe.

The research methodology comprises primary interviews with electrical equipment manufacturers, utilities, transmission system operators, data center developers, EPC contractors, infrastructure consultants, and industry experts. Secondary research consists of authenticated publications from government agencies, energy organizations, utility associations, technology institutions and peer-reviewed journals published after 2022. The market estimation is based on investments in hyperscale data centers, electricity demand growth, cloud infrastructure expansion, AI computing capacity, modernization of transmission infrastructure and utility capital expenditure. Forecast models consider the integration of renewable energies, deployment of smart grids, the electrification of industry, regulatory developments and expansion of power infrastructure. Forecast accuracy is ensured through data triangulation with equipment manufacturers, utilities, data center operators and infrastructure specialists.

## Key Market Segments

### By Components:

Transformers

Switchgears

Air Insulated

Gas Insulated

Relays

Capacitors

Busbar

Surge Protection

By Voltage:

33 kV–110 kV

110 kV–220 kV

220 kV–500 kV

Above 500 kV

By Channel Partners:

OEMs

TSO/DSO

Key Market Players

Bharat Heavy Electricals Limited (BHEL)

CG Power and Industrial Solutions Limited

Eaton Corporation

Fuji Electric Co., Ltd.

General Electric

Hitachi Energy

Hyundai Electric & Energy Systems Co., Ltd.

Mitsubishi Electric Corporation

NARI Technology Co., Ltd.

Schneider Electric SE

## Industry Trends

The rapid expansion of hyperscale data centers is driving strong demand for high-capacity electrical substations equipped with advanced power distribution infrastructure capable of supporting continuous operations, high-density computing environments, and increasing digital infrastructure requirements.

Electricity consumption across data center facilities is rising significantly due to the rapid growth of artificial intelligence (AI), cloud computing, high-performance computing (HPC), and data-intensive enterprise applications that require reliable, uninterrupted power supply.

Smart digital substations incorporating IoT sensors, predictive maintenance, intelligent automation, and real-time monitoring are improving operational reliability, asset performance, fault detection, and energy management while reducing maintenance costs and minimizing unexpected downtime.

Utilities and data center operators are investing heavily in higher-voltage transmission infrastructure to support the development of next-generation hyperscale campuses, improve grid stability, and meet rapidly increasing electricity demand from digital infrastructure.

Gas-insulated switchgear (GIS) is witnessing growing adoption in data center environments with space constraints due to its compact footprint, enhanced operational reliability, lower maintenance requirements, and superior performance under high-voltage operating conditions.

Integration of renewable energy sources and microgrid deployment is becoming increasingly important for improving sustainability, enhancing energy resilience, reducing carbon emissions, and supporting uninterrupted power supply for mission-critical data center operations.

Digital substation automation technologies are enabling predictive asset management, remote diagnostics, intelligent grid operations, automated fault detection, and optimized power distribution, improving overall efficiency and reliability of electrical infrastructure.

Modular and prefabricated electrical substations are gaining significant traction by reducing construction timelines, simplifying installation, enabling rapid deployment, and supporting the accelerated expansion of hyperscale and enterprise data center facilities.

Growing emphasis on redundancy, resilience, and uninterrupted power supply is driving investments in advanced transformers, intelligent relays, surge protection systems, digital switchgear, and automated switching equipment to strengthen power infrastructure reliability.

Ongoing grid modernization initiatives and increasing investments in high-voltage transmission infrastructure are expected to drive long-term growth of the global data center substation market by supporting expanding cloud infrastructure, AI-ready facilities, and next-generation digital ecosystems.

## Market Determinants

**Rapid Expansion of Hyperscale Data Centers and Cloud Infrastructure:** The increasing construction of hyperscale data centers by cloud service providers is a major driver of the data center substation market. Rising demand for cloud computing, artificial intelligence (AI), big data analytics, and digital services is significantly increasing electricity requirements, compelling operators to invest in high-capacity substations capable of delivering reliable and uninterrupted power. According to the International Energy Agency (IEA, 2024), electricity demand from data centers continues to rise as AI computing and cloud infrastructure expand globally.

**Growing AI and High-Performance Computing Workloads:** The widespread deployment of AI training models, generative AI applications, and high-performance computing (HPC) clusters is substantially increasing power density within data centers. Advanced substations equipped with intelligent transformers, digital switchgear, and automated protection systems are

becoming essential to support higher electrical loads while ensuring operational reliability and energy efficiency.

**Increasing Investments in Grid Modernization and Smart Power Infrastructure:** Governments, utilities, and private infrastructure developers are investing in modern transmission and distribution networks to strengthen power reliability for rapidly growing digital infrastructure. Digital substations incorporating IoT-enabled monitoring, predictive maintenance, intelligent relays, and automated control systems are improving grid stability while minimizing operational disruptions for mission-critical data center facilities.

**Rising Demand for Sustainable and Energy-Efficient Power Distribution:** Data center operators are increasingly integrating renewable energy sources, battery energy storage systems, and smart power management technologies to reduce carbon emissions and improve energy efficiency. Modern substations support renewable energy integration, load balancing, voltage regulation, and efficient power distribution while helping operators achieve corporate sustainability objectives.

**High Capital Investment and Long Infrastructure Deployment Cycles:** Developing utility-grade substations requires significant investment in transformers, switchgear, protection systems, electrical engineering, civil infrastructure, and grid interconnection. Long construction timelines, permitting requirements, and utility coordination can delay deployment, particularly for large hyperscale projects.

**Supply Chain Constraints and Equipment Availability:** Growing global demand for high-voltage transformers, gas-insulated switchgear, protection relays, and specialized electrical equipment has created supply chain challenges and longer procurement lead times. Shortages of critical electrical components may affect project schedules and increase infrastructure development costs.

## Opportunity Mapping Based on Market Trends

**Expansion of AI-Optimized Hyperscale Data Center Campuses:** The rapid global expansion of AI-ready hyperscale campuses is creating substantial opportunities for advanced substation infrastructure capable of supporting ultra-high-density computing environments. Operators are increasingly deploying high-capacity

electrical systems designed to deliver reliable power for GPU clusters, AI accelerators, and next-generation cloud platforms. According to the International Energy Agency (IEA, 2024), continued growth in AI computing will significantly increase electricity demand from digital infrastructure throughout the coming decade.

**Adoption of Smart Digital Substations:** Utilities and infrastructure developers are increasingly investing in digital substations equipped with intelligent sensors, remote monitoring, predictive analytics, digital protection systems, and automated asset management capabilities. Vendors offering smart substation technologies that improve reliability, operational efficiency, and maintenance optimization are expected to benefit from accelerating digital grid transformation.

**Integration of Renewable Energy and Energy Storage Systems:** As data center operators pursue carbon neutrality, demand is increasing for substations capable of integrating solar, wind, battery energy storage, fuel cells, and microgrid technologies. Manufacturers providing grid-interactive substations and advanced energy management solutions are expected to capture growing opportunities in sustainable digital infrastructure projects.

**Growth of Edge Data Centers and Regional Digital Infrastructure:** The rapid deployment of edge computing facilities, regional cloud availability zones, and distributed digital infrastructure is expanding demand for compact, modular, and prefabricated substations. Companies developing scalable electrical infrastructure solutions for edge data centers, telecommunications facilities, and regional cloud hubs are well positioned to benefit from long-term market expansion.

## Value-Creating Segments and Growth Pockets

Transformers dominate the market through growing demand for high-capacity power distribution

The market is segmented on the basis of Components, which are Transformers, Switchgears, Relays, Capacitors, Busbar and Surge Protection. Of these, Transformers are estimated to hold the largest share of the global data center substation market at 34.7% in 2025. The segment's leadership is driven by the growing deployment of hyperscale and colocation data centers that require efficient voltage transformation,

high-capacity power transmission, and uninterrupted electrical distribution. The fast-growing AI computing, cloud infrastructure and high-density server environments continue to drive investments in advanced power transformers with higher energy efficiency and operational reliability. The International Energy Agency (IEA, 2024) says that the growing electricity demand of digital infrastructure requires huge investments in new transmission and distribution equipment.

The Switchgear segment, particularly Gas-Insulated Switchgear (GIS) is projected to grow at a highest CAGR of 11.2% during the forecast period. GIS's small footprint, improved operational safety, lower maintenance requirements and high reliability are making it increasingly well-suited for space-constrained hyperscale and urban data center facilities.

### 110 kV–220 kV Dominates the Market While 220 kV–500 kV Records the Fastest Growth

The 110 kV–220 kV segment accounted for the largest market share of an estimated 46.9% in 2025, driven by its widespread deployment across hyperscale, colocation, and large enterprise data centres requiring reliable high-capacity power transmission and efficient voltage distribution. This voltage range provides an optimal balance between transmission efficiency, operational reliability, and infrastructure costs, making it the preferred choice for modern high-density digital infrastructure. Growing investments in cloud computing, artificial intelligence (AI), and hyperscale facilities continue to strengthen demand for substations operating within this voltage range.

The 220 kV–500 kV segment is projected to register the highest CAGR of approximately 11.3% during 2026–2036, supported by rapid expansion of hyperscale campuses, increasing AI and high-performance computing workloads, rising electricity demand, and large-scale renewable energy integration. Continuous investments in ultra-high-capacity transmission infrastructure and next-generation data center developments are expected to accelerate adoption of higher-voltage substations across major digital infrastructure projects worldwide.

### OEMs Dominate the Market While TSO/DSO Register the Fastest Growth

Original Equipment Manufacturers (OEMs) accounted for the largest market share of an estimated 64.8% in 2025, driven by their critical role in designing, manufacturing, and supplying transformers, switchgear, protection systems, power distribution equipment, and integrated substation solutions for hyperscale and enterprise data centers. OEMs

continue to benefit from increasing investments in new data center construction, modernization of electrical infrastructure, and rising demand for high-capacity, energy-efficient power systems. Their strong engineering capabilities, turnkey project expertise, and long-term service agreements further reinforce their leadership across global data center infrastructure projects.

The Transmission System Operators (TSO) and Distribution System Operators (DSO) segment is expected to register the highest CAGR of approximately 10.8% during 2026–2036, supported by expanding grid modernization initiatives, growing renewable energy integration, increasing electricity demand from AI-driven data centers, and rising investments in high-voltage transmission and distribution networks. Continuous collaboration between utilities and data center developers to strengthen grid reliability and ensure uninterrupted power supply is expected to accelerate long-term growth in this segment.

## Regional Market Assessment

North America dominates the market through hyperscale data center expansion and grid modernization

North America held the largest share of the global data center substation market, estimated to contribute 38.4% of the total revenue in 2025. The region benefits from the presence of major hyperscale cloud providers, large investments in artificial intelligence (AI) infrastructure, mature digital ecosystems and the continued growth of enterprise and colocation data centers. The United States leads regional demand, with large-scale development of AI-ready data center campuses and continued modernization of electricity transmission and distribution networks. North America's digital infrastructure continues to drive large increases in electricity demand, underpinning investments in resilient power systems and advanced substation technologies, according to the International Energy Agency (IEA, 2024).

Asia Pacific records the fastest growth through digital infrastructure expansion and AI investments

In 2026, the Asia Pacific region is expected to witness the fastest growth with an estimated CAGR of 10.9% during the forecast period from 2026 to 2036. China, India, Japan, Singapore, South Korea and Australia are expanding hyperscale data center capacity rapidly to support cloud computing, AI applications, digital transformation and growing internet traffic. The market is fueled by government initiatives promoting digital

economies, boosting investments in the integration of renewable energy and the rapid deployment of high-capacity power infrastructure. The International Telecommunication Union (ITU, 2024) notes that ongoing growth in digital connectivity and cloud infrastructure in the Asia Pacific is driving demand for advanced electrical transmission and distribution systems.

Europe strengthens its position through sustainable data center development and energy transition

Europe is a key regional market with growing investment in sustainable data center build-out, smart grid modernization, and renewable energy integration. Germany, the UK, Ireland, the Netherlands, France and the Nordics are still growing hyperscale and colocation facilities, with a focus on energy efficiency and low-carbon infrastructure. Supporting the long-term growth of the region is the increasing deployment of digital substations, intelligent power management systems and grid-connected renewable energy solutions. According to the European Commission (2024) investments in digital infrastructure and the modernization of the energy system remain central to Europe's digital and sustainability objectives.

LAMEA presents emerging opportunities through digital transformation and utility infrastructure upgrades

The LAMEA region is expected to see consistent market growth as the governments and private investors are increasing spending on digital infrastructure, cloud services, and utility modernization. The Middle East countries are investing heavily in hyperscale data centers, smart cities and AI-enabled digital economies, while the Latin America market is witnessing a rising demand for colocation facilities and enterprise cloud infrastructure. The digital ecosystem in Africa is improving steadily through enhanced electricity infrastructure, broadband connectivity and regional data center development. Ongoing investments in digital infrastructure, power transmission and energy resilience in emerging economies will drive the data center substation market to grow over the long term, the World Bank (2024) predicts.

## Recent Developments

June 2025: Hitachi Energy expanded its digital substation portfolio with AI-enabled grid monitoring, intelligent transformers, and advanced protection systems designed to support hyperscale data center power infrastructure and improve grid resilience.

May 2025: Schneider Electric SE introduced next-generation smart power distribution solutions featuring digital switchgear, real-time energy analytics, and predictive asset management for large-scale data center campuses.

October 2024: Eaton Corporation enhanced its medium-voltage electrical infrastructure portfolio by launching intelligent switchgear and power distribution technologies optimized for AI-ready and hyperscale data center applications.

September 2024: Mitsubishi Electric Corporation expanded its high-voltage transformer and substation solutions with advanced monitoring capabilities, energy-efficient designs, and digital control technologies to improve operational reliability in mission-critical data centers.

## Critical Business Questions Addressed

What is the current and projected size of the global data center substation market?

The global data center substation market was valued at USD 10.20 billion in 2025 and is projected to reach USD 31.95 billion by 2036, growing at a CAGR of 9.9% during the forecast period.

Which factors are driving market growth?

The market is driven by hyperscale data center expansion, AI and high-performance computing adoption, cloud infrastructure investments, smart substations, grid modernization, and demand for reliable, energy-efficient power distribution systems.

Which component segment dominates the market?

Transformers dominate the market due to their essential role in voltage regulation, efficient power transmission, and ensuring uninterrupted electricity supply for high-capacity data center operations.

Which voltage segment dominates the market?

The 110 kV–220 kV segment dominates the market owing to its widespread adoption across hyperscale and enterprise data centers, offering high transmission efficiency,

scalability, and operational reliability.

Which region offers the strongest future growth opportunities?

Asia Pacific offers the strongest future growth opportunities, driven by rapid digital infrastructure expansion, increasing AI investments, hyperscale data center construction, and growing cloud computing adoption.

### Beyond the Forecast

The data center substation market is expected to evolve toward AI-enabled, digitally managed, and highly resilient electrical infrastructure, supporting next-generation hyperscale campuses, AI factories, and high-density computing environments with intelligent power distribution and autonomous grid management.

Advancements in digital substations, intelligent transformers, IoT-enabled asset monitoring, predictive maintenance, digital twins, gas-insulated switchgear (GIS), battery energy storage systems, renewable energy integration, and AI-powered energy management platforms will significantly enhance operational reliability, grid efficiency, and sustainability while reducing downtime and maintenance costs.

As artificial intelligence, cloud computing, edge computing, hyperscale infrastructure, renewable energy adoption, and smart grid modernization continue to accelerate globally, organizations investing in intelligent substation technologies, advanced electrical equipment, and integrated power management ecosystems will be well positioned to achieve sustained long-term growth in the global data center substation market.

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