

Global Gas-Insulated Metal-Enclosed Switchgear Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Gas-Insulated Metal-Enclosed Switchgear market size was valued at US\$ 29325 million in 2025 and is forecast to a readjusted size of US\$ 47634 million by 2032 with a CAGR of 7.1% during review period.

Gas-Insulated Metal-Enclosed Switchgear is a compact, high-voltage electrical equipment that uses sealed, pressurized sulfur hexafluoride gas as an insulating medium rather than air. It houses critical components—breakers, switches, and busbars—within grounded metal enclosures, offering high reliability, compact footprints, and protection against harsh environments.

In 2025, the global production of gas-insulated metal-enclosed switchgear will reach 605,000 units, with an average price of US\$47,100 per unit and an average gross profit margin of 24.8%.

Based on our research, the gas-insulated switchgear market should be understood as a compact, high-reliability power equipment segment rather than a simple replacement category for conventional switchgear. GIS integrates primary electrical components inside a sealed metal enclosure and uses gas insulation to reduce environmental exposure, improve operational safety, and minimize installation footprint. This makes it particularly suitable for urban substations, underground substations, coastal and polluted environments, railway systems, data centers, offshore wind power, industrial power networks, and high-voltage transmission applications. Although GIS is more expensive than air-insulated switchgear on a unit basis, it can reduce land requirements, improve reliability, shorten construction schedules, and lower

maintenance requirements over the equipment lifecycle. Therefore, this study adopts a narrow GIS and C-GIS scope and excludes ordinary AIS, low-voltage switchgear, transformers, GIL, and installation services from the revenue model.

From a supply perspective, the global market has a two-layer structure. The high-voltage and extra-high-voltage GIS segment is concentrated among multinational and national champion manufacturers with strong engineering, testing, and project-reference capabilities. Companies such as Hitachi Energy, Siemens Energy, GE Vernova, Mitsubishi Electric, Toshiba, Hyosung Heavy Industries, HD Hyundai Electric, and LS Electric have strong positions in high-voltage applications and international grid projects. The medium-voltage C-GIS segment is more fragmented and regionally competitive, with strong participation from Chinese, European, Taiwanese, Indian, and Southeast Asian manufacturers. China has become a particularly important supply base, with China XD Electric, Pinggao Electric, Sieyuan Electric, Shandong Taikai, and other manufacturers expanding across domestic grid projects and selected overseas markets.

From a demand perspective, the main growth drivers include grid expansion, renewable energy integration, urban substation construction, replacement of aging substations, data center power demand, rail transit electrification, offshore wind connection, and industrial electrification. High-voltage GIS demand is closely linked to transmission network upgrades, large substations, cross-regional power delivery, and offshore wind export systems. Medium-voltage C-GIS demand is more closely tied to urban distribution networks, commercial buildings, data centers, industrial parks, metro systems, and renewable energy step-up stations. Asia is expected to remain the largest incremental demand region, driven by China, India, Southeast Asia, and the Middle East, while Europe and North America are supported by replacement, grid resilience, SF6 reduction policies, and digital substation investment.

From a technology perspective, the industry is moving from conventional SF6-based insulation toward lower-GWP gas mixtures, dry air, clean air, vacuum-interruption combinations, and digitally monitored GIS systems. SF6 remains technically strong because of its insulation and arc-quenching properties, but environmental regulations and utility procurement policies are accelerating the transition to SF6-free or reduced-SF6 solutions. Leading manufacturers are investing in eco-efficient GIS, digital monitoring, gas density supervision, partial-discharge diagnostics, modular design, and lifecycle service platforms. In this environment, future competition will be shaped not only by voltage ratings and breaking capacity, but also by environmental performance, certification, reliability data, delivery capacity, and project execution capability.

From an industry development perspective, GIS suppliers are benefiting from a broader global cycle of grid infrastructure investment. Rising electricity demand from data centers, AI infrastructure, electrified transportation, industrial electrification, and renewable energy projects is increasing demand for transformers, switchgear, and substation equipment. Capacity expansion announcements by major grid equipment suppliers indicate that the market is moving into a period where lead time, manufacturing capacity, and certified product availability matter almost as much as product specifications. Over the medium term, leading GIS manufacturers with strong high-voltage testing capabilities, SF6-free technology roadmaps, regional manufacturing footprints, and utility project references are expected to gain share, while smaller regional players will remain competitive in medium-voltage and customized distribution applications.

This report is a detailed and comprehensive analysis for global Gas-Insulated Metal-Enclosed Switchgear market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Gas-Insulated Metal-Enclosed Switchgear market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Gas-Insulated Metal-Enclosed Switchgear market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Gas-Insulated Metal-Enclosed Switchgear market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Gas-Insulated Metal-Enclosed Switchgear market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Gas-Insulated Metal-Enclosed Switchgear

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Gas-Insulated Metal-Enclosed Switchgear market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Hitachi, Siemens Energy, Schneider Electric, GE Vernova, Eaton, Mitsubishi Electric, Toshiba Energy Systems & Solutions, Meidensha, Fuji Electric, Hyosung Heavy Industries, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Gas-Insulated Metal-Enclosed Switchgear market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

SF6 Gas-insulated GIS

SF6-free Clean Air GIS

Dry Air GIS

Fluoronitrile Gas Mixture GIS

Vacuum Interruption with Gas Insulation

Other

Market segment by Voltage Level

Medium Voltage GIS

High Voltage GIS

Extra-high Voltage GIS

Ultra-high Voltage GIS

Market segment by Installation Environment

Indoor GIS

Outdoor GIS

Market segment by Application

Power Transmission Substation

Power Distribution Network

Renewable Energy Grid Connection

Data Center Power Infrastructure

Rail Transit and Electrified Transport

Industrial Power System

Commercial and Urban Infrastructure

Other

Major players covered

Hitachi

Siemens Energy

Schneider Electric

GE Vernova

Eaton

Mitsubishi Electric

Toshiba Energy Systems & Solutions

Meidensha

Fuji Electric

Hyosung Heavy Industries

HD Hyundai Electric

LS Electric

Ormazabal

Lucy Electric

Nuventura

G&W Electric

S&C Electric

CG Power and Industrial Solutions

Bharat Heavy Electricals

Alfanar

Efacec

China XD Electric

Henan Pinggao Electric

Sieyuan Electric

Shandong Taikai High Voltage Switchgear

Taikai Group

XJ Electric

CHINT Electrics

TBEA

New Northeast Electric Group

Shanghai Liangxin Electrical

Allis Electric

China Electric Manufacturing

Tatung

TECO Electric & Machinery

Fortune Electric

Lucy Electric Thailand

Tamco Switchgear

PT Bambang Djaja

Vitzro Tech

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Gas-Insulated Metal-Enclosed Switchgear product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Gas-Insulated Metal-Enclosed Switchgear, with price, sales quantity, revenue, and global market share of Gas-Insulated Metal-Enclosed Switchgear from 2021 to 2026.

Chapter 3, the Gas-Insulated Metal-Enclosed Switchgear competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Gas-Insulated Metal-Enclosed Switchgear breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Gas-Insulated Metal-Enclosed Switchgear market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Gas-Insulated Metal-Enclosed Switchgear.

Chapter 14 and 15, to describe Gas-Insulated Metal-Enclosed Switchgear sales channel, distributors, customers, research findings and conclusion.

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