

# Global Modular Substation Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Modular Substation market size is expected to reach \$ 10410 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

In 2024, global Modular Substation production capacity is 40,000 units, with production reached approximately 32,000 units, with an average global market price of around US\$ 203,000 per unit. The market gross margin is mainly 30%-40%.

Modular substations are standardized power substation units prefabricated according to their functions, consisting of high-voltage switch modules, main transformer modules, medium-voltage switch modules, protection and control modules, and auxiliary system modules. Through factory manufacturing, enclosure integration, and rapid on-site assembly, they form a complete substation system. Their core characteristics are modularity, prefabrication, scalability, and short construction period, enabling flexible application from 10kV and 35kV to 66/110kV and even 220kV voltage levels. Compared to traditional substations, modular substations move a large portion of civil engineering, installation, and commissioning to the factory, significantly shortening the construction cycle, improving quality consistency, and allowing for flexible combinations based on project scale, load demand, and future expansion requirements. They are core power distribution infrastructure for scenarios such as photovoltaic/wind power booster stations, industrial parks, data centers, rail transit, and emergency power.

The upstream of the modular substation industry chain includes power equipment suppliers such as high-voltage/medium-voltage switchgear (GIS/AIS), transformers, ring main units, SVG/reactive power compensation devices, DC systems, protection relays, communication and automation systems, prefabricated cabin structures, and fire protection and environmental control equipment. The midstream consists of system

integrators, equipment manufacturers, and EPC contractors responsible for module design, system integration, factory pre-installed and commissioned (FAT), on-site installation, and grid connection solutions. Representative companies include ABB, Siemens, Schneider, Eaton, Hitachi Energy, TGOOD, and CHINT. Downstream customers include public power grid companies, renewable energy investors, industrial parks, data center operators, and oil, gas, and mining companies, who use modular substations to achieve rapid grid connection, capacity expansion, and improved power system reliability.

With the large-scale grid connection of new energy sources, the regionalization and distributed development of power grid structures, and the rapid growth of electricity load in industrial parks and data centers, the global demand for rapidly deployable, highly reliable, and scalable substations continues to increase. Modular substations offer significant advantages over traditional substations in terms of project cycle time (reducing it by 30-60%), smaller footprint, compatibility with digital secondary systems and the IEC 61850 architecture, and are better suited to the rapid construction of photovoltaic/wind power bases and the high-density power distribution development trend of data centers. Demand is particularly strong in the Asia-Pacific, Middle East, and Africa regions. In the future, modular substations will be deeply integrated with digital twins, intelligent operation and maintenance, and energy storage systems, becoming a mainstream solution in the construction of new power systems and new energy infrastructure.

This report studies the global Modular Substation production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Modular Substation and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Modular Substation that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Modular Substation total production and demand, 2021-2032, (Units)

Global Modular Substation total production value, 2021-2032, (USD Million)

Global Modular Substation production by region & country, production, value, CAGR,

2021-2032, (USD Million) & (Units), (based on production site)

Global Modular Substation consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Modular Substation domestic production, consumption, key domestic manufacturers and share

Global Modular Substation production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Modular Substation production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Modular Substation production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Modular Substation market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ABB Ltd, Siemens AG, Schneider Electric SE, Eaton Corporation PLC, General Electric Company, Hitachi Energy, CG Power and Industrial Solutions Ltd, LS ELECTRIC Co., Ltd, Federal Pacific, Elgin Power Solutions, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Modular Substation market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

### Global Modular Substation Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Modular Substation Market, Segmentation by Type:

Fixed Modular Substations

Skid/Trailer Mounted Modular Substations

### Global Modular Substation Market, Segmentation by Functional Modules:

Modular GIS Substation

Modular AIS Substation

Others

### Global Modular Substation Market, Segmentation by Voltage:

35-110kv

110-220kv

Above 200kv

#### Global Modular Substation Market, Segmentation by Application:

Power Utilities

Industrial

Others

#### Companies Profiled:

ABB Ltd

Siemens AG

Schneider Electric SE

Eaton Corporation PLC

General Electric Company

Hitachi Energy

CG Power and Industrial Solutions Ltd

LS ELECTRIC Co., Ltd

Federal Pacific

Elgin Power Solutions

Ampcontrol Ltd

SKEMA SpA

UTECH

Qingdao TGOOD Electric Co., Ltd (TGOOD)

CHINT Group

Chint Power Systems Co., Ltd

Orecco Electric Co., Ltd

TIANAN Electric Group Co., Ltd

Jinpan Technology Co., Ltd

Changan Group Co., Ltd

Hezong Technology Co., Ltd

CEE Power Co., Ltd

Jiangsu Zhongmeng Electric Equipment Co., Ltd

Zhejiang Nuode Electric Power Technology Co., Ltd

Zhejiang Qianfeng Electrical Equipment Co., Ltd

Fatech Power Technology Co., Ltd

Anhui Xinhongyuan Electric Power Equipment Co., Ltd

### **Key Questions Answered:**

1. How big is the global Modular Substation market?
2. What is the demand of the global Modular Substation market?
3. What is the year over year growth of the global Modular Substation market?
4. What is the production and production value of the global Modular Substation market?
5. Who are the key producers in the global Modular Substation market?

6. What are the growth factors driving the market demand?

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