

Global Gas-Insulated Metal-Enclosed Switchgear Market Growth 2026-2032

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Abstracts

The global Gas-Insulated Metal-Enclosed Switchgear market size is predicted to grow from US\$ 27880 million in 2025 to US\$ 46418 million in 2032; it is expected to grow at a CAGR of 7.5% from 2026 to 2032.

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.

LP Information, Inc. (LPI) ' newest research report, the "Gas-Insulated Metal-Enclosed Switchgear Industry Forecast" looks at past sales and reviews total world Gas-Insulated Metal-Enclosed Switchgear sales in 2025, providing a comprehensive analysis by region and market sector of projected Gas-Insulated Metal-Enclosed Switchgear sales for 2026 through 2032. With Gas-Insulated Metal-Enclosed Switchgear sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Gas-Insulated Metal-Enclosed Switchgear industry.

This Insight Report provides a comprehensive analysis of the global Gas-Insulated Metal-Enclosed Switchgear landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Gas-Insulated Metal-Enclosed Switchgear portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Gas-Insulated Metal-Enclosed Switchgear market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Gas-Insulated Metal-Enclosed Switchgear and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Gas-Insulated Metal-Enclosed Switchgear.

This report presents a comprehensive overview, market shares, and growth opportunities of Gas-Insulated Metal-Enclosed Switchgear market by product type,

application, key manufacturers and key regions and countries.

Segmentation by Type:

SF6 Gas-insulated GIS

SF6-free Clean Air GIS

Dry Air GIS

Fluoronitrile Gas Mixture GIS

Vacuum Interruption with Gas Insulation

Other

Segmentation by Voltage Level:

Medium Voltage GIS

High Voltage GIS

Extra-high Voltage GIS

Ultra-high Voltage GIS

Segmentation by Installation Environment:

Indoor GIS

Outdoor GIS

Segmentation 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

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Gas-Insulated Metal-Enclosed Switchgear market?

What factors are driving Gas-Insulated Metal-Enclosed Switchgear market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Gas-Insulated Metal-Enclosed Switchgear market opportunities vary by end market size?

How does Gas-Insulated Metal-Enclosed Switchgear break out by Type, by Application?

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