

Global Landscape-Style Underground Substation Market Growth 2026-2032

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Abstracts

The global Landscape-Style Underground Substation market size is predicted to grow from US\$ 991 million in 2025 to US\$ 1285 million in 2032; it is expected to grow at a CAGR of 3.7% from 2026 to 2032.

In 2025, the global production volume of landscape-integrated underground transformers reached 84,381 units, with an average selling price of \$12,000 per unit. The global annual production capacity for these landscape-integrated units stands at approximately 120,000 units, with a gross margin of approximately 23.7%. A landscape-integrated underground transformer system involves burying the entire assembly—including the transformer itself and associated high- and low-voltage power distribution equipment—beneath the ground. Only ventilation shafts, access shafts, or maintenance covers remain visible at ground level; furthermore, these exposed ground components and their immediate surroundings undergo specialized landscape design (e.g., being disguised as flowerbeds, green belts, public benches, landscape sculptures, or faux-antique pavilions) to ensure they blend seamlessly into the surrounding environment. This technology combines the inherent advantages of standard underground substation units—namely, ground-space conservation, noise reduction, and aesthetic appeal—while simultaneously resolving the issue of obtrusive ground-level fixtures often associated with traditional underground equipment through artistic exterior treatments. Consequently, it is currently widely deployed in locations with exceptionally high aesthetic standards, such as urban core districts, historic quarters, parks and scenic areas, and high-end residential communities. The upstream segment of the landscape-integrated underground transformer industry chain comprises raw materials and basic components (such as metal materials), electrical equipment and modular units, and cabling and communication systems; the midstream segment consists of the manufacturers of these landscape-integrated units; and the downstream segment

primarily involves applications in municipal engineering, transportation, and the new energy sector.

Currently, the market for landscape-integrated underground transformers is undergoing a phase of steady expansion, driven primarily by the convergence of power grid upgrades in urban core areas, new-type urbanization initiatives, and the growing demand for municipal landscape beautification. By concealing transformers and other power infrastructure underground, exposing only a compact surface structure designed to blend seamlessly with the surrounding environment, this class of equipment effectively resolves the conflict between the spatial footprint of traditional box-type substations and the aesthetic integrity of the urban landscape. The competitive landscape is dominated by specialized manufacturers of power transmission and distribution equipment that possess advanced expertise in waterproofing, thermal management, and corrosion resistance; meanwhile, product development is trending toward higher levels of integration, intelligent monitoring capabilities, and enhanced environmental adaptability to meet the rigorous demands of underground operating environments.

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

This Insight Report provides a comprehensive analysis of the global Landscape-Style Underground Substation 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 Landscape-Style Underground Substation portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Landscape-Style Underground Substation market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Landscape-Style Underground Substation 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 Landscape-Style Underground Substation.

This report presents a comprehensive overview, market shares, and growth opportunities of Landscape-Style Underground Substation market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Fully Buried Type

Semi-Buried Type

Segmentation by Voltage Level:

10kV and Below

35kV and Below

Segmentation by Transformer Type:

Oil-Immersed Transformer

Dry-Type Transformer

Segmentation by Application:

Municipal Engineering

Transportation

New Energy

Others

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.

Siemens

Hitachi

Schneider Electric

Eaton

GE

ABB

WEG

Jacobsen Elektro

Ampcontrol

VRT

Ormazabal

Jiangsu Beichen Hubang Electric Power

Huaxiang Xiangneng Technology

Zhenhang Electrical Technology

Beiwei Electric Technology

Tianan Electric Group

TSTY Electric

Shenheng Electric Power Equipment

Jiangsu Haitong Electrical Appliances

Zhejiang Jihe Transformer

NanBaoTe

TYT

NIRCEE

Henan Tailong Power Equipment

Wangbian Electric

FATENG POWER

Key Questions Addressed in this Report

What is the 10-year outlook for the global Landscape-Style Underground Substation market?

What factors are driving Landscape-Style Underground Substation market growth, globally and by region?

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

How do Landscape-Style Underground Substation market opportunities vary by end market size?

How does Landscape-Style Underground Substation break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Landscape-Style Underground Substation Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Landscape-Style Underground Substation by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Landscape-Style Underground Substation by Country/Region, 2021, 2025 & 2032

2.2 Landscape-Style Underground Substation Segment by Type

- 2.2.1 Fully Buried Type
- 2.2.2 Semi-Buried Type
- 2.2.3 Landscape-Style Underground Substation Sales by Type
 - 2.2.3.1 Global Landscape-Style Underground Substation Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global Landscape-Style Underground Substation Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global Landscape-Style Underground Substation Sale Price by Type (2021-2026)

2.3 Landscape-Style Underground Substation Segment by Voltage Level

- 2.3.1 10kV and Below
- 2.3.2 35kV and Below
- 2.3.3 Landscape-Style Underground Substation Sales by Voltage Level
 - 2.3.3.1 Global Landscape-Style Underground Substation Sales Market Share by Voltage Level (2021-2026)
 - 2.3.3.2 Global Landscape-Style Underground Substation Revenue and Market Share by Voltage Level (2021-2026)

2.3.3.3 Global Landscape-Style Underground Substation Sale Price by Voltage Level (2021-2026)

2.4 Landscape-Style Underground Substation Segment by Transformer Type

2.4.1 Oil-Immersed Transformer

2.4.2 Dry-Type Transformer

2.4.3 Landscape-Style Underground Substation Sales by Transformer Type

2.4.3.1 Global Landscape-Style Underground Substation Sales Market Share by Transformer Type (2021-2026)

2.4.3.2 Global Landscape-Style Underground Substation Revenue and Market Share by Transformer Type (2021-2026)

2.4.3.3 Global Landscape-Style Underground Substation Sale Price by Transformer Type (2021-2026)

2.5 Landscape-Style Underground Substation Segment by Application

2.5.1 Municipal Engineering

2.5.2 Transportation

2.5.3 New Energy

2.5.4 Others

2.5.5 Landscape-Style Underground Substation Sales by Application

2.5.5.1 Global Landscape-Style Underground Substation Sale Market Share by Application (2021-2026)

2.5.5.2 Global Landscape-Style Underground Substation Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global Landscape-Style Underground Substation Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Landscape-Style Underground Substation Breakdown Data by Company

3.1.1 Global Landscape-Style Underground Substation Annual Sales by Company (2021-2026)

3.1.2 Global Landscape-Style Underground Substation Sales Market Share by Company (2021-2026)

3.2 Global Landscape-Style Underground Substation Annual Revenue by Company (2021-2026)

3.2.1 Global Landscape-Style Underground Substation Revenue by Company (2021-2026)

3.2.2 Global Landscape-Style Underground Substation Revenue Market Share by Company (2021-2026)

3.3 Global Landscape-Style Underground Substation Sale Price by Company

3.4 Key Manufacturers Landscape-Style Underground Substation Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Landscape-Style Underground Substation Product Location Distribution

3.4.2 Players Landscape-Style Underground Substation Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR LANDSCAPE-STYLE UNDERGROUND SUBSTATION BY GEOGRAPHIC REGION

4.1 World Historic Landscape-Style Underground Substation Market Size by Geographic Region (2021-2026)

4.1.1 Global Landscape-Style Underground Substation Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Landscape-Style Underground Substation Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Landscape-Style Underground Substation Market Size by Country/Region (2021-2026)

4.2.1 Global Landscape-Style Underground Substation Annual Sales by Country/Region (2021-2026)

4.2.2 Global Landscape-Style Underground Substation Annual Revenue by Country/Region (2021-2026)

4.3 Americas Landscape-Style Underground Substation Sales Growth

4.4 APAC Landscape-Style Underground Substation Sales Growth

4.5 Europe Landscape-Style Underground Substation Sales Growth

4.6 Middle East & Africa Landscape-Style Underground Substation Sales Growth

5 AMERICAS

5.1 Americas Landscape-Style Underground Substation Sales by Country

5.1.1 Americas Landscape-Style Underground Substation Sales by Country (2021-2026)

5.1.2 Americas Landscape-Style Underground Substation Revenue by Country (2021-2026)

5.2 Americas Landscape-Style Underground Substation Sales by Type (2021-2026)

5.3 Americas Landscape-Style Underground Substation Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Landscape-Style Underground Substation Sales by Region

6.1.1 APAC Landscape-Style Underground Substation Sales by Region (2021-2026)

6.1.2 APAC Landscape-Style Underground Substation Revenue by Region (2021-2026)

6.2 APAC Landscape-Style Underground Substation Sales by Type (2021-2026)

6.3 APAC Landscape-Style Underground Substation Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Landscape-Style Underground Substation by Country

7.1.1 Europe Landscape-Style Underground Substation Sales by Country (2021-2026)

7.1.2 Europe Landscape-Style Underground Substation Revenue by Country (2021-2026)

7.2 Europe Landscape-Style Underground Substation Sales by Type (2021-2026)

7.3 Europe Landscape-Style Underground Substation Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Landscape-Style Underground Substation by Country
 - 8.1.1 Middle East & Africa Landscape-Style Underground Substation Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Landscape-Style Underground Substation Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Landscape-Style Underground Substation Sales by Type (2021-2026)
- 8.3 Middle East & Africa Landscape-Style Underground Substation Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks
- 9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

- 10.1 Raw Material and Suppliers
- 10.2 Manufacturing Cost Structure Analysis of Landscape-Style Underground Substation
- 10.3 Manufacturing Process Analysis of Landscape-Style Underground Substation
- 10.4 Industry Chain Structure of Landscape-Style Underground Substation

11 MARKETING, DISTRIBUTORS AND CUSTOMER

- 11.1 Sales Channel
 - 11.1.1 Direct Channels
 - 11.1.2 Indirect Channels
- 11.2 Landscape-Style Underground Substation Distributors
- 11.3 Landscape-Style Underground Substation Customer

12 WORLD FORECAST REVIEW FOR LANDSCAPE-STYLE UNDERGROUND SUBSTATION BY GEOGRAPHIC REGION

12.1 Global Landscape-Style Underground Substation Market Size Forecast by Region

12.1.1 Global Landscape-Style Underground Substation Forecast by Region (2027-2032)

12.1.2 Global Landscape-Style Underground Substation Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Landscape-Style Underground Substation Forecast by Type (2027-2032)

12.7 Global Landscape-Style Underground Substation Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Siemens

13.1.1 Siemens Company Information

13.1.2 Siemens Landscape-Style Underground Substation Product Portfolios and Specifications

13.1.3 Siemens Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Siemens Main Business Overview

13.1.5 Siemens Latest Developments

13.2 Hitachi

13.2.1 Hitachi Company Information

13.2.2 Hitachi Landscape-Style Underground Substation Product Portfolios and Specifications

13.2.3 Hitachi Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Hitachi Main Business Overview

13.2.5 Hitachi Latest Developments

13.3 Schneider Electric

13.3.1 Schneider Electric Company Information

13.3.2 Schneider Electric Landscape-Style Underground Substation Product Portfolios and Specifications

13.3.3 Schneider Electric Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Schneider Electric Main Business Overview

- 13.3.5 Schneider Electric Latest Developments
- 13.4 Eaton
 - 13.4.1 Eaton Company Information
 - 13.4.2 Eaton Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.4.3 Eaton Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Eaton Main Business Overview
 - 13.4.5 Eaton Latest Developments
- 13.5 GE
 - 13.5.1 GE Company Information
 - 13.5.2 GE Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.5.3 GE Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 GE Main Business Overview
 - 13.5.5 GE Latest Developments
- 13.6 ABB
 - 13.6.1 ABB Company Information
 - 13.6.2 ABB Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.6.3 ABB Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 ABB Main Business Overview
 - 13.6.5 ABB Latest Developments
- 13.7 WEG
 - 13.7.1 WEG Company Information
 - 13.7.2 WEG Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.7.3 WEG Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 WEG Main Business Overview
 - 13.7.5 WEG Latest Developments
- 13.8 Jacobsen Elektro
 - 13.8.1 Jacobsen Elektro Company Information
 - 13.8.2 Jacobsen Elektro Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.8.3 Jacobsen Elektro Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.8.4 Jacobsen Elektro Main Business Overview
- 13.8.5 Jacobsen Elektro Latest Developments
- 13.9 Ampcontrol
 - 13.9.1 Ampcontrol Company Information
 - 13.9.2 Ampcontrol Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.9.3 Ampcontrol Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Ampcontrol Main Business Overview
 - 13.9.5 Ampcontrol Latest Developments
- 13.10 VRT
 - 13.10.1 VRT Company Information
 - 13.10.2 VRT Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.10.3 VRT Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 VRT Main Business Overview
 - 13.10.5 VRT Latest Developments
- 13.11 Ormazabal
 - 13.11.1 Ormazabal Company Information
 - 13.11.2 Ormazabal Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.11.3 Ormazabal Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Ormazabal Main Business Overview
 - 13.11.5 Ormazabal Latest Developments
- 13.12 Jiangsu Beichen Hubang Electric Power
 - 13.12.1 Jiangsu Beichen Hubang Electric Power Company Information
 - 13.12.2 Jiangsu Beichen Hubang Electric Power Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.12.3 Jiangsu Beichen Hubang Electric Power Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Jiangsu Beichen Hubang Electric Power Main Business Overview
 - 13.12.5 Jiangsu Beichen Hubang Electric Power Latest Developments
- 13.13 Huaxiang Xiangneng Technology
 - 13.13.1 Huaxiang Xiangneng Technology Company Information
 - 13.13.2 Huaxiang Xiangneng Technology Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.13.3 Huaxiang Xiangneng Technology Landscape-Style Underground Substation

Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Huaxiang Xiangneng Technology Main Business Overview

13.13.5 Huaxiang Xiangneng Technology Latest Developments

13.14 Zhenhang Electrical Technology

13.14.1 Zhenhang Electrical Technology Company Information

13.14.2 Zhenhang Electrical Technology Landscape-Style Underground Substation

Product Portfolios and Specifications

13.14.3 Zhenhang Electrical Technology Landscape-Style Underground Substation

Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Zhenhang Electrical Technology Main Business Overview

13.14.5 Zhenhang Electrical Technology Latest Developments

13.15 Beiwei Electric Technology

13.15.1 Beiwei Electric Technology Company Information

13.15.2 Beiwei Electric Technology Landscape-Style Underground Substation Product

Portfolios and Specifications

13.15.3 Beiwei Electric Technology Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Beiwei Electric Technology Main Business Overview

13.15.5 Beiwei Electric Technology Latest Developments

13.16 Tianan Electric Group

13.16.1 Tianan Electric Group Company Information

13.16.2 Tianan Electric Group Landscape-Style Underground Substation Product

Portfolios and Specifications

13.16.3 Tianan Electric Group Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Tianan Electric Group Main Business Overview

13.16.5 Tianan Electric Group Latest Developments

13.17 TSTY Electric

13.17.1 TSTY Electric Company Information

13.17.2 TSTY Electric Landscape-Style Underground Substation Product Portfolios and Specifications

13.17.3 TSTY Electric Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 TSTY Electric Main Business Overview

13.17.5 TSTY Electric Latest Developments

13.18 Shenheng Electric Power Equipment

13.18.1 Shenheng Electric Power Equipment Company Information

13.18.2 Shenheng Electric Power Equipment Landscape-Style Underground Substation Product Portfolios and Specifications

- 13.18.3 Shenheng Electric Power Equipment Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.18.4 Shenheng Electric Power Equipment Main Business Overview
- 13.18.5 Shenheng Electric Power Equipment Latest Developments
- 13.19 Jiangsu Haitong Electrical Appliances
 - 13.19.1 Jiangsu Haitong Electrical Appliances Company Information
 - 13.19.2 Jiangsu Haitong Electrical Appliances Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.19.3 Jiangsu Haitong Electrical Appliances Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 Jiangsu Haitong Electrical Appliances Main Business Overview
 - 13.19.5 Jiangsu Haitong Electrical Appliances Latest Developments
- 13.20 Zhejiang Jihe Transformer
 - 13.20.1 Zhejiang Jihe Transformer Company Information
 - 13.20.2 Zhejiang Jihe Transformer Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.20.3 Zhejiang Jihe Transformer Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.20.4 Zhejiang Jihe Transformer Main Business Overview
 - 13.20.5 Zhejiang Jihe Transformer Latest Developments
- 13.21 NanBaoTe
 - 13.21.1 NanBaoTe Company Information
 - 13.21.2 NanBaoTe Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.21.3 NanBaoTe Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.21.4 NanBaoTe Main Business Overview
 - 13.21.5 NanBaoTe Latest Developments
- 13.22 TYT
 - 13.22.1 TYT Company Information
 - 13.22.2 TYT Landscape-Style Underground Substation Product Portfolios and Specifications
 - 13.22.3 TYT Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.22.4 TYT Main Business Overview
 - 13.22.5 TYT Latest Developments
- 13.23 NIRCEE
 - 13.23.1 NIRCEE Company Information
 - 13.23.2 NIRCEE Landscape-Style Underground Substation Product Portfolios and

Specifications

13.23.3 NIRCEE Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 NIRCEE Main Business Overview

13.23.5 NIRCEE Latest Developments

13.24 Henan Tailong Power Equipment

13.24.1 Henan Tailong Power Equipment Company Information

13.24.2 Henan Tailong Power Equipment Landscape-Style Underground Substation Product Portfolios and Specifications

13.24.3 Henan Tailong Power Equipment Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 Henan Tailong Power Equipment Main Business Overview

13.24.5 Henan Tailong Power Equipment Latest Developments

13.25 Wangbian Electric

13.25.1 Wangbian Electric Company Information

13.25.2 Wangbian Electric Landscape-Style Underground Substation Product Portfolios and Specifications

13.25.3 Wangbian Electric Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)

13.25.4 Wangbian Electric Main Business Overview

13.25.5 Wangbian Electric Latest Developments

13.26 FATENG POWER

13.26.1 FATENG POWER Company Information

13.26.2 FATENG POWER Landscape-Style Underground Substation Product Portfolios and Specifications

13.26.3 FATENG POWER Landscape-Style Underground Substation Sales, Revenue, Price and Gross Margin (2021-2026)

13.26.4 FATENG POWER Main Business Overview

13.26.5 FATENG POWER Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Landscape-Style Underground Substation Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Landscape-Style Underground Substation Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Fully Buried Type
- Table 4. Major Players of Semi-Buried Type
- Table 5. Global Landscape-Style Underground Substation Sales by Type (2021-2026) & (Units)
- Table 6. Global Landscape-Style Underground Substation Sales Market Share by Type (2021-2026)
- Table 7. Global Landscape-Style Underground Substation Revenue by Type (2021-2026) & (\$ million)
- Table 8. Global Landscape-Style Underground Substation Revenue Market Share by Type (2021-2026)
- Table 9. Global Landscape-Style Underground Substation Sale Price by Type (2021-2026) & (US\$/Unit)
- Table 10. Major Players of 10kV and Below
- Table 11. Major Players of 35kV and Below
- Table 12. Global Landscape-Style Underground Substation Sales by Voltage Level (2021-2026) & (Units)
- Table 13. Global Landscape-Style Underground Substation Sales Market Share by Voltage Level (2021-2026)
- Table 14. Global Landscape-Style Underground Substation Revenue by Voltage Level (2021-2026) & (\$ million)
- Table 15. Global Landscape-Style Underground Substation Revenue Market Share by Voltage Level (2021-2026)
- Table 16. Global Landscape-Style Underground Substation Sale Price by Voltage Level (2021-2026) & (US\$/Unit)
- Table 17. Major Players of Oil-Immersed Transformer
- Table 18. Major Players of Dry-Type Transformer
- Table 19. Global Landscape-Style Underground Substation Sales by Transformer Type (2021-2026) & (Units)
- Table 20. Global Landscape-Style Underground Substation Sales Market Share by Transformer Type (2021-2026)
- Table 21. Global Landscape-Style Underground Substation Revenue by Transformer

Type (2021-2026) & (\$ million)

Table 22. Global Landscape-Style Underground Substation Revenue Market Share by Transformer Type (2021-2026)

Table 23. Global Landscape-Style Underground Substation Sale Price by Transformer Type (2021-2026) & (US\$/Unit)

Table 24. Global Landscape-Style Underground Substation Sale by Application (2021-2026) & (Units)

Table 25. Global Landscape-Style Underground Substation Sale Market Share by Application (2021-2026)

Table 26. Global Landscape-Style Underground Substation Revenue by Application (2021-2026) & (\$ million)

Table 27. Global Landscape-Style Underground Substation Revenue Market Share by Application (2021-2026)

Table 28. Global Landscape-Style Underground Substation Sale Price by Application (2021-2026) & (US\$/Unit)

Table 29. Global Landscape-Style Underground Substation Sales by Company (2021-2026) & (Units)

Table 30. Global Landscape-Style Underground Substation Sales Market Share by Company (2021-2026)

Table 31. Global Landscape-Style Underground Substation Revenue by Company (2021-2026) & (\$ millions)

Table 32. Global Landscape-Style Underground Substation Revenue Market Share by Company (2021-2026)

Table 33. Global Landscape-Style Underground Substation Sale Price by Company (2021-2026) & (US\$/Unit)

Table 34. Key Manufacturers Landscape-Style Underground Substation Producing Area Distribution and Sales Area

Table 35. Players Landscape-Style Underground Substation Products Offered

Table 36. Landscape-Style Underground Substation Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 37. New Products and Potential Entrants

Table 38. Market M&A Activity & Strategy

Table 39. Global Landscape-Style Underground Substation Sales by Geographic Region (2021-2026) & (Units)

Table 40. Global Landscape-Style Underground Substation Sales Market Share Geographic Region (2021-2026)

Table 41. Global Landscape-Style Underground Substation Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 42. Global Landscape-Style Underground Substation Revenue Market Share by

Geographic Region (2021-2026)

Table 43. Global Landscape-Style Underground Substation Sales by Country/Region (2021-2026) & (Units)

Table 44. Global Landscape-Style Underground Substation Sales Market Share by Country/Region (2021-2026)

Table 45. Global Landscape-Style Underground Substation Revenue by Country/Region (2021-2026) & (\$ millions)

Table 46. Global Landscape-Style Underground Substation Revenue Market Share by Country/Region (2021-2026)

Table 47. Americas Landscape-Style Underground Substation Sales by Country (2021-2026) & (Units)

Table 48. Americas Landscape-Style Underground Substation Sales Market Share by Country (2021-2026)

Table 49. Americas Landscape-Style Underground Substation Revenue by Country (2021-2026) & (\$ millions)

Table 50. Americas Landscape-Style Underground Substation Sales by Type (2021-2026) & (Units)

Table 51. Americas Landscape-Style Underground Substation Sales by Application (2021-2026) & (Units)

Table 52. APAC Landscape-Style Underground Substation Sales by Region (2021-2026) & (Units)

Table 53. APAC Landscape-Style Underground Substation Sales Market Share by Region (2021-2026)

Table 54. APAC Landscape-Style Underground Substation Revenue by Region (2021-2026) & (\$ millions)

Table 55. APAC Landscape-Style Underground Substation Sales by Type (2021-2026) & (Units)

Table 56. APAC Landscape-Style Underground Substation Sales by Application (2021-2026) & (Units)

Table 57. Europe Landscape-Style Underground Substation Sales by Country (2021-2026) & (Units)

Table 58. Europe Landscape-Style Underground Substation Revenue by Country (2021-2026) & (\$ millions)

Table 59. Europe Landscape-Style Underground Substation Sales by Type (2021-2026) & (Units)

Table 60. Europe Landscape-Style Underground Substation Sales by Application (2021-2026) & (Units)

Table 61. Middle East & Africa Landscape-Style Underground Substation Sales by Country (2021-2026) & (Units)

Table 62. Middle East & Africa Landscape-Style Underground Substation Revenue Market Share by Country (2021-2026)

Table 63. Middle East & Africa Landscape-Style Underground Substation Sales by Type (2021-2026) & (Units)

Table 64. Middle East & Africa Landscape-Style Underground Substation Sales by Application (2021-2026) & (Units)

Table 65. Key Market Drivers & Growth Opportunities of Landscape-Style Underground Substation

Table 66. Key Market Challenges & Risks of Landscape-Style Underground Substation

Table 67. Key Industry Trends of Landscape-Style Underground Substation

Table 68. Landscape-Style Underground Substation Raw Material

Table 69. Key Suppliers of Raw Materials

Table 70. Landscape-Style Underground Substation Distributors List

Table 71. Landscape-Style Underground Substation Customer List

Table 72. Global Landscape-Style Underground Substation Sales Forecast by Region (2027-2032) & (Units)

Table 73. Global Landscape-Style Underground Substation Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 74. Americas Landscape-Style Underground Substation Sales Forecast by Country (2027-2032) & (Units)

Table 75. Americas Landscape-Style Underground Substation Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 76. APAC Landscape-Style Underground Substation Sales Forecast by Region (2027-2032) & (Units)

Table 77. APAC Landscape-Style Underground Substation Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 78. Europe Landscape-Style Underground Substation Sales Forecast by Country (2027-2032) & (Units)

Table 79. Europe Landscape-Style Underground Substation Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 80. Middle East & Africa Landscape-Style Underground Substation Sales Forecast by Country (2027-2032) & (Units)

Table 81. Middle East & Africa Landscape-Style Underground Substation Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. Global Landscape-Style Underground Substation Sales Forecast by Type (2027-2032) & (Units)

Table 83. Global Landscape-Style Underground Substation Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 84. Global Landscape-Style Underground Substation Sales Forecast by

Application (2027-2032) & (Units)

Table 85. Global Landscape-Style Underground Substation Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 86. Siemens Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 87. Siemens Landscape-Style Underground Substation Product Portfolios and Specifications

Table 88. Siemens Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 89. Siemens Main Business

Table 90. Siemens Latest Developments

Table 91. Hitachi Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 92. Hitachi Landscape-Style Underground Substation Product Portfolios and Specifications

Table 93. Hitachi Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 94. Hitachi Main Business

Table 95. Hitachi Latest Developments

Table 96. Schneider Electric Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 97. Schneider Electric Landscape-Style Underground Substation Product Portfolios and Specifications

Table 98. Schneider Electric Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 99. Schneider Electric Main Business

Table 100. Schneider Electric Latest Developments

Table 101. Eaton Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 102. Eaton Landscape-Style Underground Substation Product Portfolios and Specifications

Table 103. Eaton Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 104. Eaton Main Business

Table 105. Eaton Latest Developments

Table 106. GE Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 107. GE Landscape-Style Underground Substation Product Portfolios and Specifications

Table 108. GE Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 109. GE Main Business

Table 110. GE Latest Developments

Table 111. ABB Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 112. ABB Landscape-Style Underground Substation Product Portfolios and Specifications

Table 113. ABB Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 114. ABB Main Business

Table 115. ABB Latest Developments

Table 116. WEG Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 117. WEG Landscape-Style Underground Substation Product Portfolios and Specifications

Table 118. WEG Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 119. WEG Main Business

Table 120. WEG Latest Developments

Table 121. Jacobsen Elektro Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 122. Jacobsen Elektro Landscape-Style Underground Substation Product Portfolios and Specifications

Table 123. Jacobsen Elektro Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 124. Jacobsen Elektro Main Business

Table 125. Jacobsen Elektro Latest Developments

Table 126. Ampcontrol Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 127. Ampcontrol Landscape-Style Underground Substation Product Portfolios and Specifications

Table 128. Ampcontrol Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 129. Ampcontrol Main Business

Table 130. Ampcontrol Latest Developments

Table 131. VRT Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 132. VRT Landscape-Style Underground Substation Product Portfolios and

Specifications

Table 133. VRT Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 134. VRT Main Business

Table 135. VRT Latest Developments

Table 136. Ormazabal Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 137. Ormazabal Landscape-Style Underground Substation Product Portfolios and Specifications

Table 138. Ormazabal Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 139. Ormazabal Main Business

Table 140. Ormazabal Latest Developments

Table 141. Jiangsu Beichen Hubang Electric Power Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 142. Jiangsu Beichen Hubang Electric Power Landscape-Style Underground Substation Product Portfolios and Specifications

Table 143. Jiangsu Beichen Hubang Electric Power Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 144. Jiangsu Beichen Hubang Electric Power Main Business

Table 145. Jiangsu Beichen Hubang Electric Power Latest Developments

Table 146. Huaxiang Xiangneng Technology Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 147. Huaxiang Xiangneng Technology Landscape-Style Underground Substation Product Portfolios and Specifications

Table 148. Huaxiang Xiangneng Technology Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 149. Huaxiang Xiangneng Technology Main Business

Table 150. Huaxiang Xiangneng Technology Latest Developments

Table 151. Zhenhang Electrical Technology Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 152. Zhenhang Electrical Technology Landscape-Style Underground Substation Product Portfolios and Specifications

Table 153. Zhenhang Electrical Technology Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 154. Zhenhang Electrical Technology Main Business

Table 155. Zhenhang Electrical Technology Latest Developments

Table 156. Beiwei Electric Technology Basic Information, Landscape-Style

Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 157. Beiwei Electric Technology Landscape-Style Underground Substation

Product Portfolios and Specifications

Table 158. Beiwei Electric Technology Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 159. Beiwei Electric Technology Main Business

Table 160. Beiwei Electric Technology Latest Developments

Table 161. Tianan Electric Group Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 162. Tianan Electric Group Landscape-Style Underground Substation Product Portfolios and Specifications

Table 163. Tianan Electric Group Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 164. Tianan Electric Group Main Business

Table 165. Tianan Electric Group Latest Developments

Table 166. TSTY Electric Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 167. TSTY Electric Landscape-Style Underground Substation Product Portfolios and Specifications

Table 168. TSTY Electric Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 169. TSTY Electric Main Business

Table 170. TSTY Electric Latest Developments

Table 171. Shenheng Electric Power Equipment Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 172. Shenheng Electric Power Equipment Landscape-Style Underground Substation Product Portfolios and Specifications

Table 173. Shenheng Electric Power Equipment Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 174. Shenheng Electric Power Equipment Main Business

Table 175. Shenheng Electric Power Equipment Latest Developments

Table 176. Jiangsu Haitong Electrical Appliances Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 177. Jiangsu Haitong Electrical Appliances Landscape-Style Underground Substation Product Portfolios and Specifications

Table 178. Jiangsu Haitong Electrical Appliances Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 179. Jiangsu Haitong Electrical Appliances Main Business
Table 180. Jiangsu Haitong Electrical Appliances Latest Developments
Table 181. Zhejiang Jihe Transformer Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors
Table 182. Zhejiang Jihe Transformer Landscape-Style Underground Substation Product Portfolios and Specifications
Table 183. Zhejiang Jihe Transformer Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 184. Zhejiang Jihe Transformer Main Business
Table 185. Zhejiang Jihe Transformer Latest Developments
Table 186. NanBaoTe Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors
Table 187. NanBaoTe Landscape-Style Underground Substation Product Portfolios and Specifications
Table 188. NanBaoTe Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 189. NanBaoTe Main Business
Table 190. NanBaoTe Latest Developments
Table 191. TYT Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors
Table 192. TYT Landscape-Style Underground Substation Product Portfolios and Specifications
Table 193. TYT Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 194. TYT Main Business
Table 195. TYT Latest Developments
Table 196. NIRCEE Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors
Table 197. NIRCEE Landscape-Style Underground Substation Product Portfolios and Specifications
Table 198. NIRCEE Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 199. NIRCEE Main Business
Table 200. NIRCEE Latest Developments
Table 201. Henan Tailong Power Equipment Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors
Table 202. Henan Tailong Power Equipment Landscape-Style Underground Substation Product Portfolios and Specifications
Table 203. Henan Tailong Power Equipment Landscape-Style Underground Substation

Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 204. Henan Tailong Power Equipment Main Business

Table 205. Henan Tailong Power Equipment Latest Developments

Table 206. Wangbian Electric Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 207. Wangbian Electric Landscape-Style Underground Substation Product Portfolios and Specifications

Table 208. Wangbian Electric Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 209. Wangbian Electric Main Business

Table 210. Wangbian Electric Latest Developments

Table 211. FATENG POWER Basic Information, Landscape-Style Underground Substation Manufacturing Base, Sales Area and Its Competitors

Table 212. FATENG POWER Landscape-Style Underground Substation Product Portfolios and Specifications

Table 213. FATENG POWER Landscape-Style Underground Substation Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 214. FATENG POWER Main Business

Table 215. FATENG POWER Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Landscape-Style Underground Substation
- Figure 2. Landscape-Style Underground Substation Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Landscape-Style Underground Substation Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Landscape-Style Underground Substation Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Landscape-Style Underground Substation Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Landscape-Style Underground Substation Sales Market Share by Country/Region (2025)
- Figure 10. Landscape-Style Underground Substation Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Fully Buried Type
- Figure 12. Product Picture of Semi-Buried Type
- Figure 13. Global Landscape-Style Underground Substation Sales Market Share by Type in 2026
- Figure 14. Global Landscape-Style Underground Substation Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of 10kV and Below
- Figure 16. Product Picture of 35kV and Below
- Figure 17. Global Landscape-Style Underground Substation Sales Market Share by Voltage Level in 2026
- Figure 18. Global Landscape-Style Underground Substation Revenue Market Share by Voltage Level (2021-2026)
- Figure 19. Product Picture of Oil-Immersed Transformer
- Figure 20. Product Picture of Dry-Type Transformer
- Figure 21. Global Landscape-Style Underground Substation Sales Market Share by Transformer Type in 2026
- Figure 22. Global Landscape-Style Underground Substation Revenue Market Share by Transformer Type (2021-2026)
- Figure 23. Landscape-Style Underground Substation Consumed in Municipal Engineering

Figure 24. Global Landscape-Style Underground Substation Market: Municipal Engineering (2021-2026) & (Units)

Figure 25. Landscape-Style Underground Substation Consumed in Transportation

Figure 26. Global Landscape-Style Underground Substation Market: Transportation (2021-2026) & (Units)

Figure 27. Landscape-Style Underground Substation Consumed in New Energy

Figure 28. Global Landscape-Style Underground Substation Market: New Energy (2021-2026) & (Units)

Figure 29. Landscape-Style Underground Substation Consumed in Others

Figure 30. Global Landscape-Style Underground Substation Market: Others (2021-2026) & (Units)

Figure 31. Global Landscape-Style Underground Substation Sale Market Share by Application (2025)

Figure 32. Global Landscape-Style Underground Substation Revenue Market Share by Application in 2025

Figure 33. Landscape-Style Underground Substation Sales by Company in 2025 (Units)

Figure 34. Global Landscape-Style Underground Substation Sales Market Share by Company in 2025

Figure 35. Landscape-Style Underground Substation Revenue by Company in 2025 (\$ millions)

Figure 36. Global Landscape-Style Underground Substation Revenue Market Share by Company in 2025

Figure 37. Global Landscape-Style Underground Substation Sales Market Share by Geographic Region (2021-2026)

Figure 38. Global Landscape-Style Underground Substation Revenue Market Share by Geographic Region in 2025

Figure 39. Americas Landscape-Style Underground Substation Sales 2021-2026 (Units)

Figure 40. Americas Landscape-Style Underground Substation Revenue 2021-2026 (\$ millions)

Figure 41. APAC Landscape-Style Underground Substation Sales 2021-2026 (Units)

Figure 42. APAC Landscape-Style Underground Substation Revenue 2021-2026 (\$ millions)

Figure 43. Europe Landscape-Style Underground Substation Sales 2021-2026 (Units)

Figure 44. Europe Landscape-Style Underground Substation Revenue 2021-2026 (\$ millions)

Figure 45. Middle East & Africa Landscape-Style Underground Substation Sales 2021-2026 (Units)

Figure 46. Middle East & Africa Landscape-Style Underground Substation Revenue 2021-2026 (\$ millions)

Figure 47. Americas Landscape-Style Underground Substation Sales Market Share by Country in 2025

Figure 48. Americas Landscape-Style Underground Substation Revenue Market Share by Country (2021-2026)

Figure 49. Americas Landscape-Style Underground Substation Sales Market Share by Type (2021-2026)

Figure 50. Americas Landscape-Style Underground Substation Sales Market Share by Application (2021-2026)

Figure 51. United States Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 52. Canada Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 53. Mexico Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 54. Brazil Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 55. APAC Landscape-Style Underground Substation Sales Market Share by Region in 2025

Figure 56. APAC Landscape-Style Underground Substation Revenue Market Share by Region (2021-2026)

Figure 57. APAC Landscape-Style Underground Substation Sales Market Share by Type (2021-2026)

Figure 58. APAC Landscape-Style Underground Substation Sales Market Share by Application (2021-2026)

Figure 59. China Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 60. Japan Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 61. South Korea Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 62. Southeast Asia Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 63. India Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 64. Australia Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 65. China Taiwan Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 66. Europe Landscape-Style Underground Substation Sales Market Share by

Country in 2025

Figure 67. Europe Landscape-Style Underground Substation Revenue Market Share by Country (2021-2026)

Figure 68. Europe Landscape-Style Underground Substation Sales Market Share by Type (2021-2026)

Figure 69. Europe Landscape-Style Underground Substation Sales Market Share by Application (2021-2026)

Figure 70. Germany Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 71. France Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 72. UK Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 73. Italy Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 74. Russia Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 75. Middle East & Africa Landscape-Style Underground Substation Sales Market Share by Country (2021-2026)

Figure 76. Middle East & Africa Landscape-Style Underground Substation Sales Market Share by Type (2021-2026)

Figure 77. Middle East & Africa Landscape-Style Underground Substation Sales Market Share by Application (2021-2026)

Figure 78. Egypt Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 79. South Africa Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 80. Israel Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 81. Turkey Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 82. GCC Countries Landscape-Style Underground Substation Revenue Growth 2021-2026 (\$ millions)

Figure 83. Manufacturing Cost Structure Analysis of Landscape-Style Underground Substation in 2026

Figure 84. Manufacturing Process Analysis of Landscape-Style Underground Substation

Figure 85. Industry Chain Structure of Landscape-Style Underground Substation

Figure 86. Channels of Distribution

Figure 87. Global Landscape-Style Underground Substation Sales Market Forecast by

Region (2027-2032)

Figure 88. Global Landscape-Style Underground Substation Revenue Market Share Forecast by Region (2027-2032)

Figure 89. Global Landscape-Style Underground Substation Sales Market Share Forecast by Type (2027-2032)

Figure 90. Global Landscape-Style Underground Substation Revenue Market Share Forecast by Type (2027-2032)

Figure 91. Global Landscape-Style Underground Substation Sales Market Share Forecast by Application (2027-2032)

Figure 92. Global Landscape-Style Underground Substation Revenue Market Share Forecast by Application (2027-2032)

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