

Gas-Insulated Substation Market by Voltage Type (Medium, High, and Extra High), Installation (Indoor and Outdoor), Output Power, End User (Power Transmission Utility, Distribution Utility, and Generation Utility), and Region - Global Forecast to 2023

<https://marketpublishers.com/r/GDEC571FFB2EN.html>

Date: January 2019

Pages: 133

Price: US\$ 5,650.00 (Single User License)

ID: GDEC571FFB2EN

Abstracts

“The gas-insulated substation market is projected to grow at a CAGR of 9.27%, from 2018 to 2023.”

The gas-insulated substation market is projected to reach USD 29.5 billion by 2023, from an estimated USD 18.9 billion in 2018, at a CAGR of 9.27%. This growth is primarily due to the rise in renewable power generation, increasing investments in the transmission & distribution infrastructure, escalating energy demand, limitations of space availability in densely populated urban areas, and government initiatives toward improving electricity access. The high installation cost can act as a restraint for gas-insulated substations.

“The medium voltage segment is expected to grow at the highest CAGR from 2018 to 2023.”

Medium voltage gas insulated substation is expected to grow at the highest CAGR from 2018 to 2023. The market is primarily driven due to the rapid improvement in the power distribution sector through the implementation of smart grid and smart metering technology. This equipment is mainly used by the core sector, power generation, infrastructure, transportation, and distribution system industries. They are also used for the protection of industrial equipment such as generators, motors and compressors,

HVAC and air-conditioning, heating and lighting equipment, step-up transformer bushing, and overload current.

“Asia Pacific: The largest market for gas-insulated substations.”

Asia Pacific is expected to account for the largest market share of the global gas-insulated substation market in 2018. This trend is projected to continue until 2023. It is the most populated region in the world and consequently witnesses a high demand for electricity. Countries such as China, Japan, and India are investing in their grid expansion projects to increase distribution grid reliability. China accounted for the largest share of the gas-insulated substation market in Asia Pacific in 2017 and is estimated to have the highest installed generation and distribution capacity during the forecast period. China, which is an export-oriented economy, has witnessed exponential growth in demand for electricity in the past couple of decades, fuelled by industrialization and infrastructural developments. Almost all the countries in the region are augmenting their generation capacities. India, China, and Indonesia are investing heavily in their hydroelectric power projects. Japan, China, and India are also emphasizing on nuclear and solar power generation to meet their increasing energy demand. This has led to a rise in investments in the transmission & distribution sector by connecting renewable energy generation to the grid and are expected to drive the growth of the gas-insulated substation market in Asia Pacific.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1– 70%, Tier 2– 20%, and Tier 3–10%

By Designation: C-Level- 50%, Director Level- 20%, and Others- 30%

By Region: North America- 40%, Asia Pacific- 21%, Europe- 15%, The Middle East & Africa- 13%, and South America- 11%

Note: Others includes product engineers, product specialists, and engineering leads.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2017. Tier 1: >USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3:

Contents

1 INTRODUCTION

- 1.1 OBJECTIVES OF THE STUDY
- 1.2 DEFINITION
- 1.3 MARKET SCOPE
 - 1.3.1 MARKETS COVERED
 - 1.3.2 REGIONAL SCOPE
 - 1.3.3 YEARS CONSIDERED FOR THE STUDY
- 1.4 CURRENCY
- 1.5 STAKEHOLDERS

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH METHODOLOGY SCOPE
- 2.2 MARKET SIZE ESTIMATION
 - 2.2.1 IDEAL DEMAND-SIDE ANALYSIS
 - 2.2.1.1 Assumptions
 - 2.2.1.2 Calculation
 - 2.2.2 SUPPLY-SIDE ANALYSIS
 - 2.2.2.1 Assumptions
 - 2.2.2.2 Calculation
 - 2.2.3 FORECAST
- 2.3 STATISTICS
 - 2.3.1 T&D INVESTMENT, BY REGION (2014–2035)
- 2.4 SOME OF THE INSIGHTS OF INDUSTRY EXPERTS

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

- 4.1 ATTRACTIVE OPPORTUNITIES IN THE GAS-INSULATED SUBSTATION MARKET
- 4.2 ASIA PACIFIC GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER & COUNTRY
- 4.3 GAS-INSULATED SUBSTATION MARKET, BY COUNTRY
- 4.4 GAS-INSULATED SUBSTATION MARKET, BY VOLTAGE RATING
- 4.5 GAS-INSULATED SUBSTATION MARKET, BY VOLTAGE RATING

4.6 GAS-INSULATED SUBSTATION MARKET, BY INSTALLATION

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

5.2.1 DRIVERS

5.2.1.1 Rising energy demand and space constraint in densely populated urban areas

5.2.1.2 Increasing investments in T&D sector

5.2.2 RESTRAINTS

5.2.2.1 High cost of equipment as compared to air-insulated substation

5.2.2.2 Stringent environmental & safety regulations

5.2.3 OPPORTUNITIES

5.2.3.1 Development of an environment-friendly alternative to SF6 gas

5.2.3.2 Adoption of the HVDC technology

5.2.4 CHALLENGES

5.2.4.1 Delays in grid expansion projects

6 GAS-INSULATED SUBSTATION MARKET, BY VOLTAGE

6.1 INTRODUCTION

6.2 MEDIUM VOLTAGE

6.2.1 RAPID DEVELOPMENT OF RESIDENTIAL AND COMMERCIAL INFRASTRUCTURE

6.3 HIGH VOLTAGE

6.3.1 INCREASING INVESTMENTS FOR POWER GENERATION PLANTS

6.4 EXTRA-HIGH VOLTAGE

6.4.1 RISING FOCUS ON DEVELOPMENT OF POWER TRANSMISSION FOR LONG DISTANCE

7 GAS-INSULATED SUBSTATION MARKET, BY INSTALLATION

7.1 INTRODUCTION

7.2 INDOOR

7.2.1 INCREASING INVESTMENTS IN THE ENERGY SECTOR ACROSS THE NATION

7.3 OUTDOOR

7.3.1 RISING FOCUS ON DEVELOPMENT OF POWER TRANSMISSION AND

DISTRIBUTION FOR LONG DISTANCE

8 GAS-INSULATED SUBSTATION MARKET, BY END-USER

8.1 INTRODUCTION

8.2 POWER TRANSMISSION UTILITY

8.2.1 INCREASING INVESTMENT FOR DEVELOPMENT OF TRANSMISSION GRID EXPANSION AND REFURBISHMENT

8.3 POWER DISTRIBUTION UTILITY

8.3.1 SPACE CONSTRAINT MEANWHILE RISING DEMAND FOR ELECTRICITY

8.4 POWER GENERATION UTILITY

8.4.1 RISING DEMAND FOR EFFICIENT AND LONG- LASTING POWER INFRASTRUCTURE

8.5 OTHERS

9 GAS-INSULATED SUBSTATION, BY REGION

9.1 INTRODUCTION

9.2 NORTH AMERICA

9.2.1 BY VOLTAGE TYPE

9.2.2 BY INSTALLATION

9.2.3 BY END-USER

9.2.4 BY COUNTRY

9.2.4.1 US

9.2.4.1.1 Increasing investments for replacing and refurbishing the aged transmission infrastructure

9.2.4.2 Canada

9.2.4.2.1 Rising number of projects from renewables, especially offshore wind, which demands further substations to connect electricity to grid

9.2.4.3 Mexico

9.2.4.3.1 Improving and modernizing transmission & distribution networks under government's reforms

9.3 ASIA PACIFIC

9.3.1 BY VOLTAGE TYPE

9.3.2 BY INSTALLATION

9.3.3 BY END-USER

9.3.4 BY COUNTRY

9.3.4.1 China

9.3.4.1.1 Rising demand for efficient and long-lasting power infrastructure

9.3.4.2 India

9.3.4.2.1 Increased transformation capacity along with demand for 765 kV transmission lines

9.3.4.3 Japan

9.3.4.3.1 Renovation of grid infrastructure to integrate it with distributed energy sources

9.3.4.4 Australia

9.3.4.4.1 Adoption of new technologies, including electric vehicles, requiring advanced substations for power reliability

9.3.4.5 South Korea

9.3.4.5.1 Rising demand for power from densely populated areas along with modernization of grid

9.3.4.6 Indonesia

9.3.4.6.1 Increasing demand for electricity and plan to develop small and medium wind energy systems

9.3.4.7 Rest Of Asia Pacific

9.4 EUROPE

9.4.1 BY VOLTAGE TYPE

9.4.2 BY INSTALLATION

9.4.3 BY END-USER

9.4.4 BY COUNTRY

9.4.4.1 UK

9.4.4.1.1 Rapid development of ICT buildings and aged infrastructure

9.4.4.2 Germany

9.4.4.2.1 Continuous electricity addition through renewables along with construction of HVDC lines

9.4.4.3 France

9.4.4.3.1 Reducing power dependence on nuclear sources and increased demand for grid infrastructure to connect renewables to grid

9.4.4.4 Spain

9.4.4.4.1 Decentralization of power sector along with grid interconnectivity

9.4.4.5 Norway

9.4.4.5.1 Construction of 420 kV of transmission lines for increased wind production

9.4.4.6 Rest Of Europe

9.5 MIDDLE EAST & AFRICA

9.5.1 BY VOLTAGE TYPE

9.5.2 BY INSTALLATION

9.5.3 BY END-USER

9.5.4 BY COUNTRY

9.5.4.1 Saudi Arabia

9.5.4.1.1 Plans for construction of high voltage transmission networks along with establishment of new transmission substations

9.5.4.2 UAE

9.5.4.2.1 Energy generation through nuclear reactors, demanding for adequate transmission infrastructure

9.5.4.3 South Africa

9.5.4.3.1 Rising focus on development of high voltage transmission network

9.5.4.4 Egypt

9.5.4.4.1 Development of power infrastructure to cater to the rapidly growing power demand

9.5.4.5 Kuwait

9.5.4.5.1 Space constraint and rising demand for electricity, driving construction of space efficient gas-insulated substation

9.5.4.6 Rest Of The Middle East & Africa

9.6 SOUTH AMERICA

9.6.1 BY VOLTAGE TYPE

9.6.2 BY INSTALLATION

9.6.3 BY END-USER

9.6.4 BY COUNTRY

9.6.4.1 Brazil

9.6.4.1.1 Increasing dependence on hydroelectric power source, driving the demand for substations

9.6.4.2 Argentina

9.6.4.2.1 Construction plans for 500 kV high voltage transmission lines by 2018

9.6.4.3 Chile

9.6.4.3.1 Rising investments in energy sector across the nation

9.6.4.4 Rest Of South America

10 COMPETITIVE LANDSCAPE

10.1 OVERVIEW

10.2 RANKING OF PLAYERS

10.3 COMPETITIVE SCENARIO

10.3.1 NEW PRODUCT DEVELOPMENT

10.3.2 EXPANSIONS & INVESTMENTS

10.3.3 CONTRACTS & AGREEMENTS

10.3.4 MERGERS & ACQUISITIONS

10.4 MICRO QUADRANT OVERVIEW

10.4.1 VISIONARY LEADERS:

10.4.2 INNOVATORS:

10.4.3 DYNAMIC DIFFERENTIATORS:

11 COMPANY PROFILE

11.1 COMPANY BENCHMARKING

(Business overview, Products offered, Recent Developments, MNM view)*

11.2 HITACHI

11.3 GENERAL ELECTRIC

11.4 ABB

11.5 MITSUBISHI ELECTRIC

11.6 TOSHIBA CORPORATION

11.7 LARSEN & TOUBRO

11.8 SIEMENS AG

11.9 CG POWER AND INDUSTRIAL SOLUTIONS

11.10 HYOSUNG

11.11 BHARAT HEAVY ELECTRICALS LIMITED

11.12 TBEA CO. LTD.

11.13 ELSEWEDY ELECTRIC

*Details on Business overview, Products offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

12 APPENDIX

12.1 INSIGHTS OF INDUSTRY EXPERTS

12.2 DISCUSSION GUIDE

12.1 KNOWLEDGE STORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

12.2 AVAILABLE CUSTOMIZATIONS

12.3 RELATED REPORTS

12.4 AUTHOR DETAILS

List Of Tables

LIST OF TABLES

- TABLE 1 GAS-INSULATED SUBSTATION MARKET SNAPSHOT
- TABLE 2 GLOBAL URBAN POPULATION OVERVIEW, BY REGION, 1990, 2014, 2050
- TABLE 3 GLOBAL T&D INFRASTRUCTURE EXPANSION PLANS
- TABLE 4 KEY HVDC PROJECTS BY ABB
- TABLE 5 GAS-INSULATED SUBSTATION MARKET SIZE, BY VOLTAGE, 2016–2023 (USD MILLION)
- TABLE 6 MEDIUM VOLTAGE: GAS-INSULATED SUBSTATION MARKET SIZE, BY REGION, 2016–2023 (USD MILLION)
- TABLE 7 HIGH VOLTAGE: GAS-INSULATED SUBSTATION MARKET SIZE, BY REGION, 2016–2023 (USD MILLION)
- TABLE 8 EXTRA-HIGH VOLTAGE: GAS-INSULATED SUBSTATION MARKET SIZE, BY REGION, 2016–2023 (USD MILLION)
- TABLE 9 GAS-INSULATED SUBSTATION MARKET SIZE, BY INSTALLATION, 2016–2023 (USD MILLION)
- TABLE 10 ASIA INDOOR: GAS-INSULATED SUBSTATION MARKET SIZE, BY REGION, 2016–2023 (USD MILLION)
- TABLE 11 OUTDOOR: GAS-INSULATED SUBSTATION MARKET SIZE, BY REGION, 2016–2023 (USD MILLION)
- TABLE 12 GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD BILLION)
- TABLE 13 POWER TRANSMISSION UTILITY: GAS-INSULATED SUBSTATION MARKET SIZE, BY REGION, 2016–2023 (USD MILLION)
- TABLE 14 POWER DISTRIBUTION UTILITY: GAS-INSULATED SUBSTATION MARKET SIZE, BY REGION, 2016–2023 (USD MILLION)
- TABLE 15 POWER GENERATION UTILITY: GAS-INSULATED SUBSTATION MARKET SIZE, BY REGION, 2016–2023 (USD MILLION)
- TABLE 16 OTHERS: GAS-INSULATED SUBSTATION MARKET SIZE, BY REGION, 2016–2023 (USD MILLION)
- TABLE 17 GAS-INSULATED SUBSTATION MARKET, BY REGION, 2016–2023 (USD MILLION)
- TABLE 18 GAS-INSULATED SUBSTATION MARKET, BY TOP COUNTRY, 2016–2023 (USD MILLION)
- TABLE 19 NORTH AMERICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY VOLTAGE TYPE, 2016–2023 (USD MILLION)
- TABLE 20 NORTH AMERICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY

INSTALLATION, 2016–2023 (USD MILLION)

TABLE 21 NORTH AMERICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 22 NORTH AMERICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY COUNTRY, 2016–2023 (USD MILLION)

TABLE 23 US: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 24 CANADA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 25 MEXICO: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 26 ASIA PACIFIC: GAS-INSULATED SUBSTATION MARKET SIZE, BY VOLTAGE TYPE, 2016–2023 (USD MILLION)

TABLE 27 ASIA PACIFIC: GAS-INSULATED SUBSTATION MARKET SIZE, BY INSTALLATION, 2016–2023 (USD MILLION)

TABLE 28 ASIA PACIFIC: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 29 ASIA PACIFIC: GAS-INSULATED SUBSTATION MARKET SIZE, BY COUNTRY, 2016–2023 (USD MILLION)

TABLE 30 CHINA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 31 INDIA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 32 JAPAN: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 33 AUSTRALIA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 34 SOUTH KOREA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 35 INDONESIA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 36 REST OF ASIA PACIFIC: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 37 EUROPE: GAS-INSULATED SUBSTATION MARKET SIZE, BY VOLTAGE TYPE, 2016–2023 (USD MILLION)

TABLE 38 EUROPE: GAS-INSULATED SUBSTATION MARKET SIZE, BY INSTALLATION, 2016–2023 (USD MILLION)

TABLE 39 NORTH AMERICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 40 EUROPE: GAS-INSULATED SUBSTATION MARKET SIZE, BY COUNTRY, 2016–2023 (USD MILLION)

TABLE 41 UK: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 42 GERMANY: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 43 FRANCE: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 44 SPAIN: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 45 NORWAY: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 46 REST OF EUROPE: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 47 MIDDLE EAST & AFRICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY VOLTAGE TYPE, 2016–2023 (USD MILLION)

TABLE 48 MIDDLE EAST & AFRICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY INSTALLATION, 2016–2023 (USD MILLION)

TABLE 49 NORTH AMERICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 50 MIDDLE EAST & AFRICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY COUNTRY, 2016–2023 (USD MILLION)

TABLE 51 SAUDI ARABIA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 52 UAE: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 53 SOUTH AFRICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 54 EGYPT: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 55 KUWAIT: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 56 REST OF MIDDLE EAST & AFRICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 57 SOUTH AMERICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY VOLTAGE TYPE, 2016–2023 (USD MILLION)

TABLE 58 SOUTH AMERICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY INSTALLATION, 2016–2023 (USD MILLION)

TABLE 59 SOUTH AMERICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY

END-USER, 2016–2023 (USD MILLION)

TABLE 60 SOUTH AMERICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY COUNTRY, 2016–2023 (USD MILLION)

TABLE 61 BRAZIL: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 62 ARGENTINA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 63 CHILE: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 64 REST OF SOUTH AMERICA: GAS-INSULATED SUBSTATION MARKET SIZE, BY END-USER, 2016–2023 (USD MILLION)

TABLE 65 DEVELOPMENTS OF KEY PLAYERS IN THE MARKET, 2014–NOVEMBER 2018

List Of Figures

LIST OF FIGURES

FIGURE 1 SUBSTATION INSTALLATION OF KEY END-USER INDUSTRIES IS THE MAJOR DETERMINING FACTOR FOR GAS-INSULATED SUBSTATIONS

FIGURE 2 ASIA PACIFIC HELD THE LARGEST SHARE OF THE GAS-INSULATED SUBSTATION MARKET IN 2017

FIGURE 3 HIGH VOLTAGE SEGMENT OF THE GAS-INSULATED SUBSTATION MARKET IS EXPECTED TO GROW AT THE HIGHEST CAGR DURING THE FORECAST PERIOD

FIGURE 4 POWER TRANSMISSION UTILITY SEGMENT, BY END-USER, IS EXPECTED TO GROW AT THE HIGHEST CAGR DURING THE FORECAST PERIOD

FIGURE 5 OUTDOOR TYPE SEGMENT OF THE GAS-INSULATED SUBSTATION MARKET IS EXPECTED TO GROW AT THE HIGHEST CAGR DURING THE FORECAST PERIOD

FIGURE 6 RISING INVESTMENTS IN TRANSMISSION & DISTRIBUTION INFRASTRUCTURE ARE EXPECTED TO DRIVE THE GAS-INSULATED SUBSTATION MARKET DURING THE FORECAST PERIOD

FIGURE 7 POWER TRANSMISSION UTILITY SEGMENT & THE CHINESE MARKET HELD THE MAXIMUM SHARE OF THE GAS-INSULATED SUBSTATION MARKET IN ASIA PACIFIC IN 2017

FIGURE 8 SAUDI ARABIA IS EXPECTED TO GROW AT THE HIGHEST CAGR DURING THE FORECAST PERIOD

FIGURE 9 HIGH VOLTAGE SEGMENT IS EXPECTED TO DOMINATE THE GAS-INSULATED SUBSTATION MARKET DURING THE FORECAST PERIOD

FIGURE 10 INDOOR SEGMENT IS EXPECTED TO DOMINATE THE GAS-INSULATED SUBSTATION MARKET DURING THE FORECAST PERIOD

FIGURE 11 INDOOR SEGMENT BY INSTALLATION, IS EXPECTED TO DOMINATE THE GAS-INSULATED SUBSTATION MARKET DURING THE FORECAST PERIOD

FIGURE 12 GAS-INSULATED SUBSTATION: DRIVERS, RESTRAINTS, OPPORTUNITIES, & CHALLENGES

FIGURE 13 GAS-INSULATED SUBSTATION MARKET FOR HIGH VOLTAGE IS EXPECTED TO HOLD THE LARGEST MARKET SHARE BY 2023

FIGURE 14 OUTDOOR INSTALLATION SEGMENT IS EXPECTED TO HAVE THE HIGHEST GROWTH DURING THE FORECAST PERIOD

FIGURE 15 POWER TRANSMISSION UTILITY SEGMENT IS EXPECTED TO HOLD THE LARGEST MARKET SHARE IN 2023

FIGURE 16 REGIONAL SNAPSHOT: THE MARKET IN ASIA PACIFIC IS EXPECTED

TO GROW AT THE HIGHEST CAGR DURING THE FORECAST PERIOD

FIGURE 17 GAS-INSULATED SUBSTATION MARKET SHARE (VALUE), BY REGION, 2017

FIGURE 18 ASIA PACIFIC: MARKET SNAPSHOT

FIGURE 19 MIDDLE EAST & AFRICA: MARKET SNAPSHOT

FIGURE 20 KEY DEVELOPMENTS IN THE GAS-INSULATED SUBSTATION MARKET, 2014– NOVEMBER 2018

FIGURE 21 RANKING OF KEY PLAYERS & INDUSTRY CONCENTRATION, 2017

FIGURE 22 SUPPLY CHAIN GAS INSULATED SUBSTATION MARKET (GLOBAL), COMPETITIVE LEADERSHIP MAPPING, 2018

FIGURE 23 HITACHI: COMPANY SNAPSHOT

FIGURE 24 GENERAL ELECTRIC: COMPANY SNAPSHOT

FIGURE 25 ABB: COMPANY SNAPSHOT

FIGURE 26 MITSUBISHI ELECTRIC: COMPANY SNAPSHOT

FIGURE 27 TOSHIBA CORPORATION: COMPANY SNAPSHOT

FIGURE 28 L&T: COMPANY SNAPSHOT

FIGURE 29 SIEMENS AG: COMPANY SNAPSHOT

FIGURE 30 CG POWER AND INDUSTRIAL SOLUTIONS LIMITED: COMPANY SNAPSHOT

FIGURE 31 HYOSUNG: COMPANY SNAPSHOT

FIGURE 32 BHEL: COMPANY SNAPSHOT

FIGURE 33 ELSEWEDY ELECTRIC: COMPANY SNAPSHOT

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