

Gas-insulated Switchgear Market by Voltage Rating, Insulation Type, Installation (Indoor, Outdoor), End User (Transmission Utility, Distribution Utility, Generation Utility, Railways & Metros, Industry & OEM), and Region - Global Forecast to 2025

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Abstracts

“The gas-insulated switchgear market is projected to reach USD 26.5 billion by 2025, at a CAGR of 9.5% during the forecast period”

The global gas-insulated switchgear market is projected to grow from USD 16.9 billion in 2020 to USD 26.5 billion by 2025, at a CAGR of 9.5%. The factors driving the growth for gas-insulated switchgear are the growing investments in renewable energy and government initiatives to reduce carbon emissions along with the expansion of electrical grids due to the growing industrialization and urbanization.

“The SF6 segment is expected to dominate the gas-insulated switchgear market during the forecast period”

The SF6 segment is anticipated to constitute the majority of the gas-insulated switchgear market share. A gas-insulated switchgear uses the dielectric gas sulfur hexafluoride, also known as SF6, at moderate pressure for phase-to-phase and phase-to-ground insulation. High-voltage conductors, interrupters, circuit breakers, switches, voltage transformers, and current transformers are in SF6 inside a metal enclosure. A global increase in the demand for electricity is expected to drive the demand for gas-insulated switchgears across various sectors, such as the power distribution utility, power transmission utility, and power generation utility. Thus, the growing demand for power will boost the demand for gas-insulated switchgears during the forecast period. However, COVID-19 is expected to delay the ongoing projects, which will negatively

impact the demand for gas-insulated switchgear in the next 2 years.

“SF6-free is expected to grow at the highest rate during the forecast period.”

SF6 gas has been used as the standard gas inside high-voltage electrical equipment as an arc-quenching and insulating medium; however, it is not environmentally friendly. SF6 is also listed by the Kyoto Protocol as an extremely potent greenhouse gas, with 23,500 times the comparative global warming potential of CO2. Due to this, manufacturers were trying to find a potential replacement for it in power equipment; to this end, Siemens and ABB launched an environment-friendly dielectric gas. For instance, Siemens developed an SF6-free gas-insulated switchgear for the 170-kV voltage level that uses treated air, known as “Clean Air” made up of nitrogen (80%) and oxygen (20%), as an alternative to SF6 as the insulating medium. Also, ABB developed AirPlus, a gas-insulated switchgear which uses a gas mixture with 99.99% lower global warming potential. Thus, growing environmental concerns are likely to enhance the demand for SF6-free gas-insulated switchgears.

“APAC is expected to grow at the highest rate during the forecast period”

APAC is currently the fastest-growing gas-insulated switchgear market, followed by North America and Europe. An increase in the consumption and production of electricity in APAC countries, such as China and India, is expected. The growing demand for electricity due to a growing population will lead to an increase in the transmission and distribution system, which is expected to boost the demand for gas-insulated switchgear. COVID-19 is drastically affecting both the service and manufacturing sectors alike. With more and more countries resorting to nationwide lockdowns to prevent a further spike in the spread of disease, the Asian economy has slowed down due to a high number of COVID-19 cases in countries such as China and India; this is expected to affect the regional gas-insulated switchgear market.

Breakdown of primaries:

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

By Company Type: Tier I: 60%, Tier II: 25%, and Tier III: 15%

By Designation: C-Level: 35%, Director Level: 25%, and Others: 40%

By Region: Europe: 30%, North America: 20%, APAC: 18%, Middle East & Africa: 20%, South America: 12%

Note: “Others” includes sales managers, marketing managers, product managers, and product engineers.

The tiers of the companies are defined based on their total revenue as of 2018; Tier 1: USD 1 billion, Tier 2: USD 500 million–1 billion, and Tier 3:

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