

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

<https://marketpublishers.com/r/G252F06C76A7EN.html>

Date: June 2020

Pages: 198

Price: US\$ 7,150.00 (Single User License)

ID: G252F06C76A7EN

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:

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 DEFINITION

1.2.1 GAS-INSULATED SWITCHGEAR MARKET, BY VOLTAGE RATING:

INCLUSIONS & EXCLUSIONS

1.2.2 GAS-INSULATED SWITCHGEAR MARKET, BY INSTALLATION: INCLUSIONS & EXCLUSIONS

1.2.3 GAS-INSULATED SWITCHGEAR MARKET, BY END USER: INCLUSIONS & EXCLUSIONS

1.3 MARKET SCOPE

1.3.1 MARKETS COVERED

1.3.2 REGIONAL SCOPE

1.3.3 YEARS CONSIDERED

1.4 CURRENCY

1.5 LIMITATIONS

1.6 STAKEHOLDERS

1.7 SUMMARY OF CHANGES

1.7.1 DEMAND HAS NOT INCREASED AS EXPECTED

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Key data from primary sources

2.1.2.2 Breakdown of primaries

2.2 SCOPE

2.3 MARKET SIZE ESTIMATION

2.3.1 DEMAND-SIDE ANALYSIS

2.3.1.1 Assumptions

2.3.2 SUPPLY-SIDE ANALYSIS

2.3.2.1 Assumptions

2.3.2.2 Calculation

2.3.3 FORECAST

2.4 MARKET BREAKDOWN AND DATA TRIANGULATION

2.5 PRIMARY INSIGHTS

3 EXECUTIVE SUMMARY

3.1 SCENARIO ANALYSIS

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES IN THE GAS-INSULATED SWITCHGEAR MARKET

4.2 GAS-INSULATED SWITCHGEAR MARKET (VALUE), BY REGION

4.3 GAS-INSULATED SWITCHGEAR MARKET, BY INSULATION TYPE

4.4 GAS-INSULATED SWITCHGEAR MARKET, BY INSTALLATION

4.5 GAS-INSULATED SWITCHGEAR MARKET, BY VOLTAGE RATING

4.6 GAS-INSULATED SWITCHGEAR MARKET, BY END USER

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 COVID-19 HEALTH ASSESSMENT

5.3 MARKET DYNAMICS

5.3.1 DRIVERS

5.3.1.1 Growing investments in renewable energy and government initiatives in reducing carbon emissions

5.3.1.2 Increasing developments in T&D and smart infrastructure

5.3.1.3 Rising energy demand and limitation of space availability in densely populated urban areas

5.3.1.4 Surging government initiatives to improve electricity access in rural areas

5.3.2 RESTRAINTS

5.3.2.1 Competition from unorganized or fragmented switchgear markets

5.3.2.2 Stringent environmental & safety regulations along with high-cost equipment

5.3.3 OPPORTUNITIES

5.3.3.1 Development of an environmental-friendly alternative to SF6 gas

5.3.3.2 Adoption of HVDC technology

5.3.4 CHALLENGES

5.3.4.1 Delays in grid expansion projects

5.3.4.2 COVID-19

6 SCENARIO ANALYSIS

- 6.1 OPTIMISTIC SCENARIO
- 6.2 REALISTIC SCENARIO
- 6.3 PESSIMISTIC SCENARIO

7 GAS-INSULATED SWITCHGEAR MARKET, BY INSTALLATION

- 7.1 INTRODUCTION
- 7.2 INDOOR
 - 7.2.1 GROWING INDUSTRIAL AND COMMERCIAL SECTOR IN DEVELOPING COUNTRIES TO INCREASE DEMAND
- 7.3 OUTDOOR
 - 7.3.1 GROWING ELECTRICITY DEMANDS LEADING TO INCREASING INVESTMENTS IN TRANSMISSION AND DISTRIBUTION NETWORK TO DRIVE DEMAND

8 GAS-INSULATED SWITCHGEAR MARKET, BY INSULATION TYPE

- 8.1 INTRODUCTION
- 8.2 SF6
 - 8.2.1 HIGH DIELECTRIC PROPERTY AND LESS SPACE REQUIREMENT FOR INSTALLATION TO INCREASE DEMAND
- 8.3 SF6-FREE
 - 8.3.1 ENVIRONMENT-FRIENDLY PROPERTIES TO DRIVE DEMAND

9 GAS-INSULATED SWITCHGEAR MARKET, BY VOLTAGE RATING

- 9.1 INTRODUCTION
- 9.2 UP TO 36 KV
 - 9.2.1 GROWING INDUSTRIAL & COMMERCIAL SECTOR IN DEVELOPING COUNTRIES TO BOOST DEMAND
- 9.3 BETWEEN 36 KV AND 72.5 KV
 - 9.3.1 GROWING URBANIZATION AND INVESTMENTS IN TRANSMISSION NETWORK TO DRIVE DEMAND
- 9.4 BETWEEN 72.5 KV AND 220 KV
 - 9.4.1 INVESTMENTS IN ELECTRICAL TRANSMISSION NETWORK TO DRIVE DEMAND
- 9.5 ABOVE 220 KV
 - 9.5.1 RAPID INCREASE IN ELECTRICITY DEMAND AND UPGRADATION OF HIGH-

VOLTAGE SUBSTATIONS TO DRIVE DEMAND

10 GAS-INSULATED SWITCHGEAR MARKET, BY END USER

10.1 INTRODUCTION

10.2 POWER TRANSMISSION UTILITY

10.2.1 EXPANDING POWER TRANSMISSION NETWORK IN DEVELOPING COUNTRIES TO INCREASE DEMAND

10.3 POWER DISTRIBUTION UTILITY

10.3.1 GROWING URBANIZATION AND SPACE CONSTRAINTS IN URBAN AREAS TO DRIVE DEMAND

10.4 POWER GENERATION UTILITY

10.4.1 GROWING POWER REQUIREMENTS TO SPUR DEMAND

10.5 RAILWAYS & METROS

10.5.1 GROWING INVESTMENTS IN RAILWAYS TO PROMOTE DEMAND

10.6 INDUSTRIES & OEM

10.6.1 GROWING INDUSTRIAL SECTOR TO BOOST DEMAND

10.7 COMMERCIAL

10.7.1 GROWING INFRASTRUCTURE AND ECONOMIES TO PROPEL DEMAND

11 GAS-INSULATED SWITCHGEAR MARKET, BY REGION

11.1 INTRODUCTION

11.1.1 IMPACT OF COVID-19 ON GLOBAL ECONOMY

11.1.2 BY REGION

11.2 ASIA PACIFIC

11.2.1 BY VOLTAGE RATING

11.2.2 BY END USER

11.2.3 BY INSULATION TYPE

11.2.4 BY INSTALLATION

11.2.5 IMPACT OF COVID-19 ON ASIA PACIFIC

11.2.6 BY COUNTRY

11.2.6.1 China

11.2.6.1.1 Increasing investments in T&D sector to drive market but COVID-19 to have negative impacts

11.2.6.2 India

11.2.6.2.1 Rising power generation to drive market but COVID-19 lockdown to have negative impacts

11.2.6.3 Japan

11.2.6.3.1 Growing infrastructure alongside growth in power substations to drive market

11.2.6.4 South Korea

11.2.6.4.1 Government initiatives toward renewable power generation to increase demand

11.2.6.5 Australia

11.2.6.5.1 Rapid industrialization with growing power requirements to boost demand

11.2.6.6 Indonesia

11.2.6.6.1 Growing government initiatives toward renewable sources to boost demand

11.2.6.7 Singapore

11.2.6.7.1 Growing consumption of electricity to enhance demand

11.2.6.8 Malaysia

11.2.6.8.1 Rapid industrialization with growing economy to boost demand

11.2.6.9 Taiwan

11.2.6.9.1 Government initiatives toward renewable power generation to increase demand

11.2.6.10 Thailand

11.2.6.10.1 Growth in power generation to boost demand

11.2.6.11 Philippines

11.2.6.11.1 Growing urbanization to spur demand

11.2.6.12 New Zealand

11.2.6.12.1 Investments in renewable generation to stimulate demand

11.3 EUROPE

11.3.1 BY VOLTAGE RATING

11.3.2 BY INSULATION

11.3.3 BY INSTALLATION

11.3.4 BY END USER

11.3.5 IMPACT OF COVID-19 ON EUROPE

11.3.6 BY COUNTRY

11.3.6.1 Germany

11.3.6.1.1 Growing economy along with sustainable growth in renewable sector to boost market

11.3.6.1.2 CIS Countries

11.3.6.2 UK

11.3.6.2.1 Increasing investments in renewables with high industrialization to drive market

11.3.6.3 France

11.3.6.3.1 Growing renewable energy consumption to increase demand

11.3.6.4 Spain

11.3.6.4.1 Upgradation of transmission system to boost demand

11.3.6.5 Italy

11.3.6.5.1 Growing government initiatives toward renewable energy to stimulate demand

11.3.6.6 Norway

11.3.6.6.1 Growing renewable energy consumption to increase demand

11.3.6.7 Sweden

11.3.6.7.1 Increasing investments in renewable energy consumption to increase demand

11.3.6.8 Denmark

11.3.6.8.1 Growing economy and use of renewable energy for power generation to raise demand

11.3.6.9 Rest of Europe

11.3.6.9.1 Growth in infrastructure with increasing power generation to boost market

11.4 NORTH AMERICA

11.4.1 BY VOLTAGE RATING

11.4.2 BY INSULATION

11.4.3 BY INSTALLATION

11.4.4 BY END USER

11.4.5 IMPACT OF COVID-19 ON NORTH AMERICA

11.4.6 BY COUNTRY

11.4.6.1 US

11.4.6.1.1 Upgradation of existing power infrastructure to drive market but COVID-19 to have adverse effects

11.4.6.2 Canada

11.4.6.2.1 Growing demand for replacement of aging electricity infrastructure to drive market

11.4.6.3 Mexico

11.4.6.3.1 Investments in electric infrastructure to boost market

11.5 MIDDLE EAST & AFRICA

11.5.1 BY VOLTAGE RATING

11.5.2 BY INSULATION TYPE

11.5.3 BY INSTALLATION

11.5.4 BY END USER

11.5.5 IMPACT OF COVID-19 ON MIDDLE EAST & AFRICA

11.5.6 BY COUNTRY

11.5.6.1 Saudi Arabia

11.5.6.1.1 Growing investments in power generation projects to increase demand

11.5.6.2 UAE

11.5.6.2.1 Growing construction sector to increase demand

11.5.6.3 South Africa

11.5.6.3.1 Growing industrial and commercial sectors to drive market

11.5.6.4 Kuwait

11.5.6.4.1 Growing energy demand to drive market

11.5.6.5 Rest of Middle East & Africa

11.5.6.5.1 Growing investments to develop power sector to drive market

11.6 SOUTH AMERICA

11.6.1 RISING POWER GENERATION CAPACITY TO DRIVE MARKET

11.6.2 BY VOLTAGE RATING

11.6.3 BY INSULATION TYPE

11.6.4 BY INSTALLATION

11.6.5 BY END USER

11.6.6 IMPACT OF COVID-19 ON SOUTH AMERICA

11.6.7 BY COUNTRY

11.6.7.1 Brazil

11.6.7.1.1 Modernization of power infrastructure to drive market

11.6.7.2 Rest of South America

11.6.7.2.1 Growing investments in renewables to drive market

12 COMPETITIVE LANDSCAPE

12.1 OVERVIEW

12.2 COMPETITIVE LEADERSHIP MAPPING (OVERALL MARKET)

12.2.1 VISIONARY LEADERS

12.2.2 INNOVATORS

12.2.3 DYNAMIC DIFFERENTIATORS

12.2.4 EMERGING COMPANIES

12.3 MARKET SHARE, 2019

12.4 COMPETITIVE SCENARIO

12.4.1 NEW PRODUCT LAUNCHES

12.4.2 MERGERS & ACQUISITIONS

12.4.3 CONTRACTS & AGREEMENTS

12.4.4 INVESTMENTS & EXPANSIONS

12.4.5 OTHERS

13 COMPANY PROFILES

(Business overview, Products/Solutions/Services Offered, Recent Developments, COVID-19 Impact, SWOT Analysis, MNM view)*

13.1 ABB

13.2 SIEMENS

13.3 SCHNEIDER ELECTRIC

13.4 GENERAL ELECTRIC

13.5 EATON CORPORATION

13.6 MITSUBISHI ELECTRIC

13.7 HITACHI

13.8 HYUNDAI ELECTRIC & ENERGY SYSTEMS

13.9 FUJI ELECTRIC

13.10 CROMPTON GREAVES POWER AND INDUSTRIAL SOLUTIONS

13.11 LARSEN & TOUBRO

13.12 NISSIN ELECTRIC

13.13 MEIDENSHA CORPORATION

13.14 POWELL INDUSTRIES

13.15 ELECKTROBUDOWA SA

13.16 ILJIN ELECTRIC

13.17 HYOSUNG

13.18 CHINT

13.19 TOSHIBA ENERGY SYSTEMS & SOLUTIONS CORPORATION

13.20 SEL S.P.A

*Details on Business overview, Products/Solutions/Services Offered, Recent Developments, COVID-19 Impact, SWOT Analysis, MNM view might not be captured in case of unlisted companies.

14 APPENDIX

14.1 INSIGHTS OF INDUSTRY EXPERTS

14.2 DISCUSSION GUIDE

14.3 KNOWLEDGE STORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

14.4 AVAILABLE CUSTOMIZATIONS

14.5 RELATED REPORTS

14.6 AUTHOR DETAILS

List Of Tables

LIST OF TABLES

TABLE 1 GAS-INSULATED SWITCHGEAR MARKET, BY INSULATION TYPE:
INCLUSIONS & EXCLUSIONS

TABLE 2 GAS-INSULATED SWITCHGEAR MARKET, BY VOLTAGE RATING:
INCLUSIONS & EXCLUSIONS

TABLE 3 GAS-INSULATED SWITCHGEAR MARKET, BY VOLTAGE: INCLUSIONS &
EXCLUSIONS

TABLE 4 GAS-INSULATED SWITCHGEAR MARKET, BY END USER: INCLUSIONS &
EXCLUSIONS

TABLE 5 GAS-INSULATED SWITCHGEAR MARKET SNAPSHOT

TABLE 6 RENEWABLE ELECTRICITY GENERATION TARGETS BY MAJOR
COUNTRIES

TABLE 7 GLOBAL URBAN POPULATION OVERVIEW, BY REGION—1990, 2018, AND
2030

TABLE 8 OPTIMISTIC SCENARIO: GAS-INSULATED SWITCHGEAR MARKET SIZE,
BY REGION, 2018–2025 (USD MILLION)

TABLE 9 REALISTIC SCENARIO: GAS-INSULATED SWITCHGEAR MARKET SIZE,
BY REGION, 2018–2025 (USD MILLION)

TABLE 10 PESSIMISTIC SCENARIO: GAS-INSULATED SWITCHGEAR MARKET
SIZE, BY REGION, 2018–2025 (USD MILLION)

TABLE 11 GAS-INSULATED SWITCHGEAR MARKET, BY INSTALLATION,
2018–2025 (USD MILLION)

TABLE 12 INDOOR: GAS-INSULATED SWITCHGEAR MARKET, BY REGION,
2018–2025 (USD MILLION)

TABLE 13 OUTDOOR: GAS-INSULATED SWITCHGEAR MARKET, BY REGION,
2018–2025 (USD MILLION)

TABLE 14 GAS-INSULATED SWITCHGEAR MARKET, BY INSULATION TYPE,
2018–2025 (USD MILLION)

TABLE 15 SF6: GAS-INSULATED SWITCHGEAR MARKET, BY REGION, 2018–2025
(USD MILLION)

TABLE 16 SF6 FREE: GAS-INSULATED SWITCHGEAR MARKET, BY REGION,
2018–2025 (USD MILLION)

TABLE 17 GAS-INSULATED SWITCHGEAR MARKET, BY VOLTAGE RATING,
2018–2025 (USD MILLION)

TABLE 18 UP TO 36 KV: GAS-INSULATED SWITCHGEAR MARKET, BY REGION,
2018–2025 (USD MILLION)

TABLE 19 GLOBAL URBAN POPULATION OVERVIEW, BY REGION—1990, 2018, AND 2030

TABLE 20 BETWEEN 36 KV AND 72.5 KV: GAS-INSULATED SWITCHGEAR MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 21 BETWEEN 72.5 KV AND 220 KV: GAS-INSULATED SWITCHGEAR MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 22 ABOVE 220 KV: GAS-INSULATED SWITCHGEAR MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 23 GAS-INSULATED SWITCHGEAR MARKET, BY END USER, 2018–2025 (USD MILLION)

TABLE 24 POWER TRANSMISSION UTILITY: GAS-INSULATED SWITCHGEAR MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 25 POWER DISTRIBUTION UTILITY: GAS-INSULATED SWITCHGEAR MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 26 POWER GENERATION UTILITY: GAS-INSULATED SWITCHGEAR MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 27 RAILWAYS & METROS: GAS-INSULATED SWITCHGEAR MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 28 INDUSTRIES & OEMS: GAS-INSULATED SWITCHGEAR MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 29 COMMERCIAL: GAS-INSULATED SWITCHGEAR MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 30 GLOBAL: GAS-INSULATED SWITCHGEAR MARKET SIZE, 2018–2025 (USD MILLION)

TABLE 31 GLOBAL: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY REGION, 2018–2025 (USD MILLION)

TABLE 32 ASIA PACIFIC: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 33 ASIA PACIFIC: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 34 ASIA PACIFIC: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY INSULATION TYPE, 2018–2025 (USD MILLION)

TABLE 35 ASIA PACIFIC: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY INSTALLATION, 2018–2025 (USD MILLION)

TABLE 36 ASIA PACIFIC: GAS-INSULATED SWITCHGEAR MARKET SIZE, 2018–2025 (USD MILLION)

TABLE 37 ASIA PACIFIC: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY COUNTRY, 2018–2025 (USD MILLION)

TABLE 38 CHINA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE

RATING, 2018–2025 (USD MILLION)

TABLE 39 CHINA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 40 INDIA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 41 INDIA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 42 JAPAN: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 43 JAPAN: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 44 SOUTH KOREA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 45 SOUTH KOREA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 46 AUSTRALIA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 47 AUSTRALIA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 48 INDONESIA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 49 INDONESIA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 50 SINGAPORE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 51 SINGAPORE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 52 MALAYSIA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 53 MALAYSIA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 54 TAIWAN: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 55 TAIWAN: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 56 THAILAND: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 57 THAILAND: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 58 PHILIPPINES: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 59 PHILIPPINES: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 60 NEW ZEALAND: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 61 NEW ZEALAND: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 62 EUROPE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 63 EUROPE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY INSULATION TYPE, 2018–2025 (USD MILLION)

TABLE 64 EUROPE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY INSTALLATION, 2018–2025 (USD MILLION)

TABLE 65 EUROPE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 66 EUROPE: GAS-INSULATED SWITCHGEAR MARKET SIZE, 2018–2025 (USD MILLION)

TABLE 67 EUROPE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY COUNTRY, 2018–2025 (USD MILLION)

TABLE 68 GERMANY: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 69 GERMANY: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 70 CIS COUNTRIES: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 71 CIS COUNTRIES: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 72 UK: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 73 UK: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 74 FRANCE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 75 FRANCE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 76 SPAIN: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 77 SPAIN: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER,

2018–2025 (USD MILLION)

TABLE 78 ITALY: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 79 ITALY: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 80 NORWAY: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 81 NORWAY: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 82 SWEDEN: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 83 SWEDEN: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 84 DENMARK: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 85 DENMARK: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 86 REST OF EUROPE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 87 REST OF EUROPE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 88 NORTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 89 NORTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY INSULATION TYPE, 2018–2025 (USD MILLION)

TABLE 90 NORTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY INSTALLATION, 2018–2025 (USD MILLION)

TABLE 91 NORTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 92 NORTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, 2018–2025 (USD MILLION)

TABLE 93 NORTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY COUNTRY, 2018–2025 (USD MILLION)

TABLE 94 US: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 95 US: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 96 CANADA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 97 CANADA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 98 MEXICO: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 99 MEXICO: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 100 MIDDLE EAST & AFRICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 101 MIDDLE EAST & AFRICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY INSULATION TYPE, 2018–2025 (USD MILLION)

TABLE 102 MIDDLE EAST & AFRICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY INSTALLATION, 2018–2025 (USD MILLION)

TABLE 103 MIDDLE EAST & AFRICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 104 MIDDLE EAST & AFRICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, 2018–2025 (USD MILLION)

TABLE 105 MIDDLE EAST & AFRICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY COUNTRY, 2018–2025 (USD MILLION)

TABLE 106 SAUDI ARABIA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 107 SAUDI ARABIA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 108 UAE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 109 UAE: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 110 SOUTH AFRICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 111 SOUTH AFRICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 112 KUWAIT: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 113 KUWAIT: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 114 REST OF MIDDLE EAST & AFRICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 115 REST OF MIDDLE EAST & AFRICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 116 SOUTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY

VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 117 SOUTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY INSULATION TYPE, 2018–2025 (USD MILLION)

TABLE 118 SOUTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY INSTALLATION, 2018–2025 (USD MILLION)

TABLE 119 SOUTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 120 SOUTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, 2018–2025 (USD MILLION)

TABLE 121 SOUTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY COUNTRY, 2018–2025 (USD MILLION)

TABLE 122 BRAZIL: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 123 BRAZIL: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

TABLE 124 REST OF SOUTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY VOLTAGE RATING, 2018–2025 (USD MILLION)

TABLE 125 REST OF SOUTH AMERICA: GAS-INSULATED SWITCHGEAR MARKET SIZE, BY END USER, 2018–2025 (USD MILLION)

List Of Figures

LIST OF FIGURES

FIGURE 1 MNM DOWNGRADES ITS FORCAST OF GAS-INSULATED SWITCHGEAR MARKET (2018–2025)

FIGURE 2 GAS-INSULATED SWITCHGEAR MARKET: RESEARCH DESIGN

FIGURE 3 MAIN METRICS CONSIDERED IN ASSESSING DEMAND FOR GAS-INSULATED SWITCHGEARS

FIGURE 4 SUPPLY-SIDE ANALYSIS

FIGURE 5 MAIN METRICS CONSIDERED IN ASSESSING SUPPLY FOR GAS-INSULATED SWITCHGEARS

FIGURE 6 RANKING OF KEY PLAYERS & INDUSTRY CONCENTRATION, 2019

FIGURE 7 DATA TRIANGULATION METHODOLOGY

FIGURE 8 KEY SERVICE PROVIDERS' POINTS OF VIEW

FIGURE 9 SCENARIO ANALYSIS: GAS-INSULATED SWITCHGEAR MARKET, 2018–2025

FIGURE 10 CENARIO ANALYSIS: GAS-INSULATED SWITCHGEAR MARKET,

FIGURE 12 OUTDOOR GAS-INSULATED SWITCHGEAR, BY INSTALLATION, TO DOMINATE MARKET DURING FORECAST PERIOD

FIGURE 13 ABOVE 220 KV, BY VOLTAGE RATING SEGMENT, TO DOMINATE MARKET DURING FORECAST PERIOD

FIGURE 14 POWER TRANSMISSION UTILITY TO HOLD LARGEST MARKET SHARE, BY END USER, DURING FORECAST PERIOD

FIGURE 16 GROWING POWER REQUIREMENTS AND UPGRADATION OF AGING ELECTRICAL INFRASTRUCTURE TO DRIVE MARKET, 2020–2025

FIGURE 22 COVID-19 THE GLOBAL PROPAGATION

FIGURE 23 GAS-INSULATED SWITCHGEAR MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

FIGURE 24 GLOBAL T&D INVESTMENTS (2012–2018)

FIGURE 25 RENEWABLE ENERGY INVESTMENTS, BY SCENARIO (2025–2030)

FIGURE 26 CRITERIA IMPACTING ECONOMY

FIGURE 27 GAS-INSULATED SWITCHGEAR MARKET, BY INSTALLATION, 2019

FIGURE 28 GAS-INSULATED SWITCHGEAR MARKET, BY INSULATION TYPE, 2019

FIGURE 29 GAS-INSULATED SWITCHGEAR MARKET, BY VOLTAGE RATING, 2019

FIGURE 30 GAS-INSULATED SWITCHGEAR MARKET, BY END USER, 2019

FIGURE 31 REGIONAL SNAPSHOT: ASIA PACIFIC AND NORTH AMERICA TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD (VALUE)

FIGURE 32 GAS-INSULATED SWITCHGEAR MARKET SHARE (VALUE), BY

REGION, 2019

FIGURE 33 GLOBAL: COVID-19 IMPACT

FIGURE 34 ASIA PACIFIC: REGIONAL SNAPSHOT (2019)

FIGURE 35 ASIA PACIFIC: COVID-19 IMPACT

FIGURE 36 EUROPE: COVID-19 IMPACT

FIGURE 37 NORTH AMERICA: REGIONAL SNAPSHOT (2019)

FIGURE 38 NORTH AMERICA: COVID-19 IMPACT

FIGURE 39 MIDDLE EAST & AFRICA: COVID-19 IMPACT

FIGURE 40 SOUTH AMERICA: COVID-19 IMPACT

FIGURE 41 KEY DEVELOPMENTS IN GAS-INSULATED SWITCHGEAR MARKET, 2017–2019

FIGURE 42 GAS-INSULATED SWITCHGEAR MARKET: (GLOBAL) COMPETITIVE LEADERSHIP MAPPING, 2019

FIGURE 43 ABB DOMINATED MARKET IN 2019

FIGURE 44 ABB: COMPANY SNAPSHOT

FIGURE 45 ABB: SWOT ANALYSIS

FIGURE 46 SIEMENS: COMPANY SNAPSHOT

FIGURE 47 SIEMENS: SWOT ANALYSIS

FIGURE 48 SCHNEIDER ELECTRIC: COMPANY SNAPSHOT

FIGURE 49 SCHNEIDER ELECTRIC: SWOT ANALYSIS

FIGURE 50 GENERAL ELECTRIC: COMPANY SNAPSHOT

FIGURE 51 GENERAL ELECTRIC: SWOT ANALYSIS

FIGURE 52 EATON CORPORATION: COMPANY SNAPSHOT

FIGURE 53 EATON CORPORATION: SWOT ANALYSIS

FIGURE 54 MITSUBISHI ELECTRIC: COMPANY SNAPSHOT

FIGURE 55 HITACHI: COMPANY SNAPSHOT

FIGURE 56 HYUNDAI ELECTRIC & ENERGY SYSTEMS: COMPANY SNAPSHOT

FIGURE 57 FUJI ELECTRIC: COMPANY SNAPSHOT

FIGURE 58 CROMPTON GREAVES POWER AND INDUSTRIAL SOLUTIONS: COMPANY SNAPSHOT

FIGURE 59 LARSEN & TOUBRO: COMPANY SNAPSHOT

FIGURE 60 NISSIN ELECTRIC: COMPANY SNAPSHOT

FIGURE 61 MEIDENSHA CORPORATION: COMPANY SNAPSHOT

FIGURE 62 POWELL INDUSTRIES: COMPANY SNAPSHOT

FIGURE 63 ELEKTROBUDOWA: COMPANY SNAPSHOT

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