

Medium Voltage Equipment Market Forecasts to 2034 – Global Analysis By Equipment Type (Switchgear, Circuit Breakers, Contactors, Disconnect Switches, Fuses, Transformers, Ring Main Units (RMUs), Protection Relays, Metering Equipment, Capacitor Banks, Surge Arresters, Busbars, Medium Voltage Drives, and Other Equipment), Voltage Range, Insulation Type, Installation Type, Application, End User, Sales Channel, and By Geography

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Abstracts

According to Statistics MRC, the Global Medium Voltage Equipment Market is accounted for \$60.7 billion in 2026 and is expected to reach \$106.8 billion by 2034 growing at a CAGR of 7.3% during the forecast period. Medium voltage equipment refers to electrical apparatus designed for operation at voltage levels typically ranging from 1 kV to 38 kV, serving as critical components in power distribution networks, industrial facilities, commercial buildings, and renewable energy systems. This market encompasses switchgear, circuit breakers, contactors, disconnect switches, fuses, transformers, ring main units, protection relays, metering equipment, capacitor banks, surge arresters, busbars, medium voltage drives, and other equipment operating across voltage ranges of 1 kV to 5 kV, above 5 kV to 15 kV, above 15 kV to 25 kV, and above 25 kV to 38 kV. Growing power infrastructure investment, increasing renewable energy integration, expanding industrialization and urbanization, and rising demand for reliable power distribution are key drivers of market expansion across all regions.

Market Dynamics:

Driver:

Increasing investment in power infrastructure and grid modernization

The growing global investment in power infrastructure expansion, grid modernization, and renewable energy integration is a primary driver for the medium voltage equipment market. Utilities are upgrading aging distribution networks to improve reliability, reduce losses, and accommodate growing electricity demand. Infrastructure projects including new substations, transmission lines, and distribution networks require medium voltage equipment. The integration of renewable energy sources including solar and wind is creating demand for medium voltage equipment for grid connection. Electrification initiatives, including electric vehicle charging infrastructure, are expanding medium voltage applications. As governments prioritize grid investment for energy security and decarbonization, medium voltage equipment demand continues growing, supporting sustained market expansion.

Restraint:

High initial investment and project delays

The significant capital investment required for medium voltage equipment deployment and project implementation delays represent a major restraint for the market. Medium voltage equipment including switchgear and transformers requires substantial upfront investment, affecting project economics. Infrastructure project timelines are often extended due to regulatory approvals, land acquisition, and financing challenges. Developing regions may face budget constraints limiting infrastructure investment. Utilities may delay equipment replacement and upgrades due to capital constraints. These financial and implementation barriers may slow market growth, particularly in regions with limited infrastructure budgets and complex regulatory environments.

Opportunity:

Adoption of digital and smart grid technologies

The growing adoption of digital substations, smart grid technologies, and IoT-enabled equipment presents significant opportunities for medium voltage equipment market expansion. Digital switchgear with integrated sensors enables real-time monitoring, predictive maintenance, and enhanced operational efficiency. Smart grid technologies including advanced metering, automation, and grid management require sophisticated

medium voltage equipment. IoT connectivity enables remote monitoring and control. The transition toward intelligent, connected grid infrastructure creates demand for advanced equipment. As digitalization accelerates and grid modernization priorities intensify, smart medium voltage equipment captures growing market share.

Threat:

Competition from alternative energy solutions

Competition from alternative energy solutions and distributed generation models poses significant threats to traditional medium voltage equipment market growth. The expansion of solar and wind energy may reduce reliance on centralized power distribution in some regions. Energy storage systems including batteries may affect grid infrastructure requirements. Microgrids and distributed generation may reduce demand for traditional distribution equipment. Decentralization of power systems may affect the scale and type of equipment required. This energy transition may impact medium voltage equipment demand patterns, particularly in regions with aggressive renewable energy and distributed generation policies.

Covid-19 Impact:

The COVID-19 pandemic had a significant impact on the medium voltage equipment market. Initial disruptions included supply chain interruptions, manufacturing slowdowns, and project delays due to lockdowns and workforce restrictions. Infrastructure investment slowed during economic uncertainty. However, the pandemic accelerated focus on grid resilience, renewable energy, and digitalization, with many governments including energy infrastructure in economic recovery packages. Post-pandemic, infrastructure investment and grid modernization have resumed, with continued focus on energy transition and grid reliability supporting medium voltage equipment demand.

The Switchgear segment is expected to be the largest during the forecast period

The Switchgear segment is expected to account for the largest market share during the forecast period, driven by its essential role in power distribution networks for protection, control, and isolation of electrical circuits. Switchgear includes air-insulated, gas-insulated, and solid-insulated types, offering comprehensive protection solutions for medium voltage applications. The segment benefits from widespread deployment across utility, industrial, and commercial applications. Growing investment in

substations, grid modernization, and renewable energy integration is driving switchgear demand. Established manufacturing infrastructure, technology maturity, and continuous innovation support segment dominance. As power infrastructure investment expands, switchgear maintains the largest equipment segment share throughout the forecast period.

The Above 15 kV–25 kV segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Above 15 kV–25 kV segment is predicted to witness the highest growth rate, fueled by increasing renewable energy integration, industrial expansion, and urbanization requiring medium voltage equipment in this voltage range. This voltage range is widely used for industrial power distribution and large commercial facilities. The segment benefits from growing renewable energy capacity, including solar and wind farms requiring grid connection at medium voltage levels. Infrastructure investment and industrial expansion in developing regions create substantial demand. As power infrastructure develops and renewable energy capacity grows, this voltage range delivers the fastest segment growth.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by aging grid infrastructure requiring modernization, strong utility investment, and significant renewable energy development. The United States leads regional growth with substantial investment in grid modernization, transmission expansion, and distribution upgrades. Strong regulatory frameworks drive infrastructure investment. Growing renewable energy integration creates demand for medium voltage equipment. Industrial and commercial sector investment supports equipment demand. With established utility infrastructure and continued modernization investment, North America maintains its dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by rapid urbanization, industrialization, expanding power infrastructure, and increasing renewable energy investment across countries including China, India, Indonesia, and Southeast Asia. The region's large and growing population and expanding economies create substantial demand for power infrastructure. Government infrastructure development programs and renewable energy targets are accelerating

equipment investment. Rural electrification and grid expansion initiatives are expanding the addressable market. As power demand grows and infrastructure investment accelerates, Asia Pacific delivers the fastest medium voltage equipment market growth globally.

Key players in the market

Some of the key players in Medium Voltage Equipment Market include ABB Ltd., Siemens AG, Schneider Electric SE, Eaton Corporation plc, Hitachi Energy Ltd., Mitsubishi Electric Corporation, Toshiba Energy Systems & Solutions Corporation, General Electric Company, Hyundai Electric & Energy Systems Co., Ltd., Fuji Electric Co., Ltd., CG Power and Industrial Solutions Ltd., Powell Industries, Inc., Lucy Group Ltd., Ormazabal, Tavrada Electric AG, and Artech Group.

Key Developments:

In July 2026, Siemens announced an investment of €300 million to expand its switchgear production facilities in Frankfurt and Offenbach, Germany, responding to surging global demand for medium-voltage infrastructure across renewable grids and AI data centers.

In July 2026, ABB introduced the HiPerGuard 34.5kV, expanding its market-breakthrough medium-voltage Uninterruptible Power Supply (UPS) portfolio to allow data centers to connect directly to 34.5kV medium-voltage grids without step-down voltage conversion losses.

In April 2026, Eaton announced a \$30 million investment to build a new 370,000-square-foot medium-voltage switchgear manufacturing plant in Bellevue, Nebraska, specifically targeted at meeting infrastructure demand from hyperscale AI data centers and utility distribution grids.

In November 2025, Schneider Electric launched its GM AirSeT primary gas-insulated switchgear at ENLIT Europe 2025 in Bilbao, expanding its eco-friendly medium-voltage portfolio with SF₆-free, pure-air insulated primary switchgear designed for heavy industrial and utility infrastructure applications.

Equipment Types Covered:

Switchgear

Circuit Breakers

Contactors

Disconnect Switches

Fuses

Transformers

Ring Main Units (RMUs)

Protection Relays

Metering Equipment

Capacitor Banks

Surge Arresters

Busbars

Medium Voltage Drives

Other Equipment

Voltage Ranges Covered:

1 kV–5 kV

Above 5 kV–15 kV

Above 15 kV–25 kV

Above 25 kV–38 kV

Insulation Types Covered:

Air Insulated

Gas Insulated

Vacuum Insulated

Solid Insulated

Oil Insulated

Installation Types Covered:

Indoor

Outdoor

Applications Covered:

Power Transmission

Power Distribution

Renewable Energy Integration

Industrial Power Systems

Grid Infrastructure

End Users Covered:

Utilities

Industrial

Commercial

Infrastructure

Oil & Gas

Mining

Renewable Energy

Transportation

Data Centers

Sales Channels Covered:

Direct Sales

Authorized Distributors

EPC Contractors

System Integrators

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

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(RoW) Regions are also represented in the same manner as above.

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