

Switchgear - Global Market Outlook (2017-2023)

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Abstracts

According to Statistics MRC, the Global Switchgear Market is accounted for \$82.98 billion in 2016 and expected to grow at a CAGR of 7.2% to reach \$134.99 billion by 2023. The market is driven by continued growth of construction & developmental activities, increasing access to electricity in developing countries, and growth in renewable power generation. On the other hand, stringent environmental & safety regulations for SF6 switchgears and increasing competition from the unorganized sector of the switchgear market are inhibiting the market growth. Few trends that the market is witnessing are upcoming smart cities, aging power infrastructure and HVDC transmission.

The gas insulated switchgear segment led the market and is anticipated to dominate the market during the forecast period due to rising energy demand and extension/replacement of old switchgear at sub-stations. Further, In August 2016, GIL Automations supplied 33kV GIS for operations at the facility of an International Oil Company operating in Nigeria which includes design and fabrication of the 33kV switchgear. Excellent insulating property along with high reliability index will drive the global industry growth. Air insulated switchgear market share will grow moderately. Vacuum insulated Switchgear market will witness strong growth owing to its high impulse to withstand voltages and power frequencies. Pollution and noise free operation along with ease of timing and actuation stimulate the segment demand.

Based on end user, the transmission & distribution utilities segment is projected to grow at the fastest rate. This is due to the increasing investments in sub-station automation, modernization of electric grid, and smart utilities (smart grids and smart meters). In 2017, Blackstone Group LP declared an investment of USD 100 billion towards the refurbishment of aging infrastructure across the U.S. The investment is backed by the Saudi Arabia Public Investment Fund under the Strategic and Policy Forum.

Medium voltage switchgear market segment dominates the global switchgear market. Rapid growth in industrialization of small and medium scales in developing countries like China, India and Japan is expected to propel demand for medium voltage switchgear market. For instance, in 2016, EverSource Energy declared an investment of about USD 900 million towards refurbishment of transmission networks across the U.S. Power is usually produced at a medium-voltage level and is then stepped up to higher voltage for transportation over longer distance. As the number of generation units increases, the number of medium-voltage switchgears used also rise in generation.

Asia-Pacific market is anticipated to dominate the global market during the forecast period. As such, governments of India and China have introduced various initiatives to improve grid connectivity in remote locations. The presence of a large number of companies, has introduced competitive pricing pressure in the market. Europe and North America markets are expected to contribute significant amount of market share during forecast period due to various factors like need for grid modernization, replacement of old installations and renewable power generation.

The key players in global Switchgear market are ABB Ltd, Alstom Grid, GE, BHEL, Crompton Greaves, Eaton, Hyosung Power and Industrial Systems, Mitsubishi Electric, Schneider Electric, Siemens, Powell Industries Inc. and Xian XD.

Insulations Covered:

Air

Oil

Gas

Vacuum

Other Insulations

Voltages Covered:

Low

Medium

Hig

End Users Covered:

Commercial and Residential Infrastructure

Manufacturing and Process Industries

Transmission & Distribution Utilities

Currents Covered:

DC

AC

Installations Covered:

Outdoor

Indoor

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

Market share assessments for the regional and country level segments

Market share analysis of the top industry players

Strategic recommendations for the new entrants

Market forecasts for a minimum of 7 years of all the mentioned segments, sub segments and the regional markets

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

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Note: South America and Middle East & Africa are represented in above manner.

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