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Air Insulated Switchgear Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Voltage (Low, Medium, High), By Application (Power Distribution Networks, Industrial Plants, Infrastructure Projects, Data Centers, Renewable Energy Integration, Others), By Region, By Competition, 2020-2030F

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Abstracts

Market Overview

The Global Air Insulated Switchgear (AIS) Market was valued at USD 9.8 billion in 2024 and is projected to reach USD 16.0 billion by 2030, growing at a CAGR of 8.4%. Market growth is primarily driven by rapid urbanization and industrial expansion, particularly in developing economies where the demand for reliable and efficient power distribution systems is rising. Government investments in modernizing and expanding outdated grid infrastructure to enhance resilience and minimize outages are accelerating the deployment of AIS solutions. Additionally, the integration of renewable energy sources, such as solar and wind, into power networks requires AIS to manage load variability and ensure seamless power distribution. The development of smart grids and microgrids further elevates the need for intelligent switchgear equipped with remote monitoring and automation capabilities. Technological advancements have improved AIS with digital diagnostics and lower maintenance costs, making them a preferred choice for utilities. Environmental regulations favoring low-emission systems also contribute to increased AIS adoption, given their reduced environmental impact compared to gas-insulated alternatives.

Key Market Drivers

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Rising Demand for Grid Modernization and Infrastructure Development

The global AIS market is experiencing significant growth due to rising investments in power grid modernization and infrastructure development. Aging transmission and distribution networks, especially in North America and Europe, are being upgraded to enhance reliability and reduce service interruptions. In developing regions, such as Asia-Pacific and Latin America, industrialization, urban development, and rural electrification efforts are spurring the construction of new substations and power systems—fueling demand for AIS. For instance, in November 2024, Mitsubishi announced an $86 million investment in a new AIS manufacturing facility in Western Pennsylvania, which will focus on producing environmentally friendly and advanced switchgear technologies. This initiative underscores the growing requirement for resilient energy infrastructure and reflects strong market momentum.

Key Market Challenges

Space Constraints and Limited Suitability for Compact Installations

A notable challenge to the adoption of AIS is its larger physical footprint compared to gas-insulated switchgear (GIS). Due to the air insulation mechanism, AIS requires increased spacing and larger enclosures, making it unsuitable for installations in densely populated or space-constrained urban settings. In cities with vertical construction and compact substations—such as transportation hubs or underground facilities—GIS is often preferred. Additionally, AIS installations demand more clearance and open layouts, complicating deployment in areas with spatial restrictions. These limitations can lead to higher land and civil engineering costs, impacting total project feasibility and cost-effectiveness in urban infrastructure projects.

Key Market Trends

Integration of Digital Technologies and Smart Grid Compatibility

A major trend influencing the AIS market is the incorporation of digital technologies to align with smart grid development. Utilities are increasingly adopting AIS equipped with IoT sensors, communication modules, and real-time data monitoring systems. These capabilities enable remote diagnostics, predictive maintenance, and enhanced asset management, reducing downtime and operational costs. Digital AIS solutions also integrate with SCADA systems, supporting advanced functions like automated fault

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detection, load balancing, and energy optimization. This trend is especially relevant as distributed energy resources such as solar panels and electric vehicles become more prevalent, requiring responsive and intelligent grid infrastructure.

Key Market Players

ABB Ltd.

Schneider Electric

Toshiba Corporation

Hitachi Energy

Eaton Corporation

Mitsubishi Electric Corporation

Larsen & Toubro Limited

ELATEC POWER DISTRIBUTION GmbH

Report Scope:

In this report, the Global Air Insulated Switchgear Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Air Insulated Switchgear Market, By Voltage:

Low

Medium

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- High

Air Insulated Switchgear Market, By Application:

- Power Distribution Networks
- Industrial Plants
- Infrastructure Projects
- Data Centers
- Renewable Energy Integration
- Others

Air Insulated Switchgear Market, By Region:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - Germany
  - France
  - United Kingdom
  - Italy
  - Spain
- Asia Pacific

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China

India

Japan

South Korea

Australia

South America

Brazil

Colombia

Argentina

Middle East & Africa

Saudi Arabia

UAE

South Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Air Insulated Switchgear Market.

Available Customizations:

Global Air Insulated Switchgear Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

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Company Information

Detailed analysis and profiling of additional market players (up to five).

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