

## **Asia Pacific Gas Insulated Switchgear - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Asia Pacific Gas Insulated Switchgear Market is expected to register a CAGR of greater than 6% during the forecast period.

The market was negatively impacted by COVID-19 in 2020. Presently the market has now reached pre-pandemic levels.

#### Key Highlights

- Over the medium term, the increasing investments in transmission & distribution infrastructure are expected to drive the market's growth.
- On the other hand, high equipment costs compared to air-insulated switchgear and stringent environmental and safety regulations related to GIS are expected to hamper the growth of Asia Pacific gas-insulated switchgear during the forecast period.
- Nevertheless, expanding or replacing old switchgear at substations in developed regions will likely create lucrative growth opportunities for the Asia Pacific gas-insulated switchgear market.
- China dominates the market and will likely witness the highest CAGR during the forecast period. This growth is attributed to increasing investments and supportive government policies.

#### APAC Gas Insulated Switchgear Market Trends

##### High Voltage Level Segment Expected to Dominate the Market

- The power system with a voltage above 36kV is called high voltage switchgear. As the voltage level is high, the arcing produced

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during the switching operation is also very high. So, special care is to be taken while designing high-voltage switchgear. The high-voltage circuit breaker is the main component of HV switchgear. Hence high, voltage circuit breakers (CB) should have special features for safe and reliable operation.

- In 2021, China's annual renewable energy capacity reached nearly 1152.5 Terawatt-hour (TWh), an increase from around 33.5% from the previous year.
- This switchgear has multiple usages across China's industries such as wind turbines, electrical motors, generators, solar power generation, residential power distribution, power supply systems, environmentally sensitive installation, underground stations, steel, paper, and mining industry, and the growing number of marine applications. But the main application of the segment comes from the large transmission and distribution networks being modernized and built across the globe with exceptionally high rates countries in the Asia-Pacific region.
- Most of the transmission and distribution (T&D) projects connecting small renewable energy projects with demand centers are focused on reducing the ecological impact to bolster the environmental credentials of T&D projects, which have traditionally disrupted large tracts of land in ecologically sensitive zones. Due to this, gas-insulated transformers provide the perfect option to reduce the impact on the environment by reducing land footprint and eliminating chances of fire hazards and water contamination.
- For instance, in February 2021, PowerGrid Corporation of India commissioned its 2GW-320kV, 165km long Pugalur-Thrissur High Voltage Direct Current (HVDC) line built at USD 700 million. Further, in December 2020, the Indian state of Maharashtra unveiled plans to build a USD 1.08 billion 800 kV underground HVDC project to supply an additional 1 GW of electricity to Mumbai. These projects require significant high-voltage components, including GIS.
- In March 2022, State Grid Corp of China started the construction of two ultrahigh voltage power transmission projects with a total investment of USD 1.7 billion. It comprises an ultrahigh voltage (UHV) power transmission line linking Fuzhou with Xiamen in Fujian province and a line connecting Zhumadian in Henan province with Wuhan in Hubei province. The project is likely to come online by 2023. Further, the planned investment by the State Grid Corporation of China in the country's electricity network infrastructure is expected to exceed USD 74 billion in 2022, which is 25% more than the state-owned firm spent in 2021. Such increasing investments are anticipated to create a massive demand for gas-insulated switch gears (GIS).
- Therefore, the growing electricity demand and the government's efforts to increase transmission and distribution networks will drive the segment in the coming years.

#### China to Dominate the Market

- The Asia-Pacific region is one of the most populated regions, and due to rapid growth in industrialization and urbanization, power demand surged substantially over the past few years. Thus, transmission and distribution (T&D) infrastructure investments also grew significantly. Additionally, long-distance T&D projects become more eco-friendly by developing underground networks and smaller substations, for which gas-insulated switch gears are increasingly suitable.
- In China, approximately 30% of the country's primary electricity generation is consumed in the provinces along the eastern coast. However, 33% and 20% of the wind and solar power generated in the northwest regions, i.e., China's power generation hub, were curtailed or unused, partly due to the lack of transmission infrastructure to reach the demand centers.
- According to China's largest state-owned utility corporation, State Grid Corporation of China (SGCC), the country's energy demand in 2030, is expected to exceed 10 Petawatt hours (PWH). As a result, there is a need for the expansion of the existing power transmission network, which is expected to drive the demand for gas-insulated high voltage switchgear in the country.
- In 2021, most of China's completed power supply project investments went toward wind power. Around CNY 247.8 billion was spent on wind power supply infrastructure completed during the respective year. China's total investments in power construction reached over CNY one trillion in 2021.
- In May 2022, German start-up Nuventura is seeking partners in China to commercialize a replacement for sulfur hexafluoride (SF<sub>6</sub>), the world's most harmful greenhouse gas widely used in electricity distribution grids. The Asian Development Bank-backed

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firm plans to transfer its technology to makers of medium voltage gas-insulated switchgear (GIS) in China that lack the capabilities to develop a replacement for SF6.

- Therefore, with various government initiatives launched by China, the Asia-Pacific region is expected to dominate the gas-insulated switchgear market during the forecast period.

## APAC Gas Insulated Switchgear Industry Overview

The Asia Pacific Gas, insulated switchgear market is moderately fragmented in nature. Some of the major players in the market (in no particular order) include Schneider Electric SE, General Electric Company, Eaton Corporation PLC, Siemens Energy AG, and Toshiba Corp., among others.

### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

### **Table of Contents:**

#### 1 INTRODUCTION

##### 1.1 Scope of the Study

##### 1.2 Market Definition

##### 1.3 Study Assumptions

#### 2 EXECUTIVE SUMMARY

#### 3 RESEARCH METHODOLOGY

#### 4 MARKET OVERVIEW

##### 4.1 Introduction

##### 4.2 Market Size and Demand Forecast in USD billion, till 2028

##### 4.3 Recent Trends and Developments

##### 4.4 Government Policies and Regulations

##### 4.5 Market Dynamics

##### 4.5.1 Drivers

##### 4.5.2 Restraints

##### 4.6 Supply Chain Analysis

##### 4.7 Porter's Five Forces Analysis

##### 4.7.1 Bargaining Power of Suppliers

##### 4.7.2 Bargaining Power of Consumers

##### 4.7.3 Threat of New Entrants

##### 4.7.4 Threat of Substitute Products and Services

##### 4.7.5 Intensity of Competitive Rivalry

#### 5 MARKET SEGMENTATION

##### 5.1 Voltage Level

##### 5.1.1 Low Voltage

##### 5.1.2 Medium Voltage

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- 5.1.3 High Voltage
- 5.2 End User
  - 5.2.1 Power Utilities
  - 5.2.2 Industrial Sector
  - 5.2.3 Commercial and Residential
- 5.3 Geography
  - 5.3.1 China
  - 5.3.2 India
  - 5.3.3 Japan
  - 5.3.4 South Korea
  - 5.3.5 Rest of Asia-Pacific

## 6 COMPETITIVE LANDSCAPE

- 6.1 Mergers and Acquisitions, Joint Ventures, Collaborations, and Agreements
- 6.2 Strategies Adopted by Leading Players
- 6.3 Company Profiles
  - 6.3.1 Hitachi Ltd.
  - 6.3.2 Schneider Electric SE
  - 6.3.3 General Electric Company
  - 6.3.4 Powell Industries Inc.
  - 6.3.5 Eaton Corporation PLC
  - 6.3.6 Toshiba Corp.
  - 6.3.7 Mitsubishi Electric Corporation
  - 6.3.8 Siemens Energy AG
  - 6.3.9 Hyosung Heavy Industries Corp.
  - 6.3.10 Bharat Heavy Electricals Limited

## 7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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