Asia-Pacific High Voltage Switchgear - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 110 pages | Mordor Intelligence

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Report description:

The Asia-Pacific High Voltage Switchgear Market size is estimated at USD 3.49 billion in 2025, and is expected to reach USD 4.87 billion by 2030, at a CAGR of 6.91% during the forecast period (2025-2030).

Key Highlights
- Over the medium period, increasing electricity generation and consumption, along with the changing power generation industry dynamics, are expected to be the major drivers for the transmission and distribution network growth, which, in turn, is expected to drive the high voltage switchgear market during the forecast period.
- On the other hand, stringent environmental and safety regulations related to the high voltage switchgear market are restraining factors. Also, increasing competition from the unorganized sector of the overall switchgear market is expected to restrain the high voltage switchgear market in the coming years.
- Nevertheless, expanding power transmission and distribution infrastructure to achieve high electricity access rates in developing and underdeveloped nations is expected to create significant opportunities for high-voltage switchgear manufacturers.

Asia-Pacific High Voltage Switchgear Market Trends

Gas-Insulated Switchgear is Expected to Witness a Significant Growth

- The gas-insulated switchgear (GIS) is a metal-enclosed device with different high-voltage components like disconnectors and circuit breakers. The device is more reliable, environment-friendly, and flexible than air-insulated switchgear (AIS). Fostered by

better space optimization, low maintenance cost, and enhanced protection against external elements, the demand for gas-insulated switchgear is likely to increase during the forecast period.
- The primary use of switchgear is to provide safety to the distribution system by disengaging in hazardous conditions. The gas-insulated switchgear is commonly used in high or ultra-high-voltage systems. In the gas-insulated switchgear, sulfur hexafluoride (SF6) gas is used for insulation, and vacuum technology is used for circuit breaking. SF6 gas is chemically stable, non-flammable, and highly electronegative, with a dielectric property making it suitable for the gas-insulated switch gears.
- Gas-insulated switchgear is generally used in power transmission applications, integration of renewable power generation units toward the grid, substations, railways, industrial complexes, etc., where the gas-insulated switchgear plays a vital role in protecting and controlling electrical devices.
- Most of the transmission and distribution projects connecting remote renewable energy projects with demand centers are focused on reducing the environmental impact and enhancing such initiatives' environmental sustainability. Generally, these projects have 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.
- Additionally, in 2022, according to International Renewable Energy (IRENA) statistics, the total renewable energy installed capacity for the Asia-Pacific region accounted for 1684.9 GW. The use of renewable energy is expected to increase. As gas-insulated switchgear is safe in the use of renewable projects, thus, demand for this segment is expected to grow in the forecast period.
- Therefore, owing to the above points, the demand for gas-insulated switchgear is expected to witness significant growth during the forecast period.

China is Expected to Dominate the Market

- The Asia-Pacific region is also the fastest-growing market in renewable energy deployment, led by China and India. Due to the rapid rise in renewable power generation, grid stability has become a significant issue in countries with a high level of renewable integration in their grids, which needs the modernization of older T&D infrastructure. As renewable power generated from sources such as solar and wind provide variable power output, traditional T&D systems may not be suitable for renewable energy transmission & distribution and require up-gradation or retrofitting.
- 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 to expand the existing power transmission network, which is expected to drive the demand for high-voltage switchgear in the country.
- According to Energy Institute Statistical Review of World Energy , the total energy consumption of China accounted for 159.3 Exajoules in 2022, which was more significant than 157.94 Exajoules in 2021. Thus, the increasing energy consumption will create demand for power transmission networks, which, in turn, will support the market's growth in the forecast period.
- The demand for the high-voltage direct current (HVDC) transmission system is expected to supplement further the integration of large-scale renewables located far away from the demand centers in China's power grid. This, in turn, is likely to drive the high-voltage switchgear market in the country.
- Therefore, owing to the above points, China is expected to grow significantly during the forecast period.

Asia-Pacific High Voltage Switchgear Industry Overview

The Asia-Pacific high-voltage switchgear market is semi-consolidated. Some of the key players in this market (not in a particular order) include ABB Ltd, Schneider Electric SE, General Electric Company, Toshiba International Corporation, and Mitsubishi Electric Corporation, among others.

General Electric Company is focused on addressing the challenges of the energy transition by enabling the safe and reliable connection of renewable and distributed energy resources to the grid. The company has developed a range of products which help improve safety, and flexibility. As a part of its strategy, the company developed products like, Hybrid Gas-Insulated Switchgear and Mobile station.?

The B105 & T155 H-GIS Hybrid Gas-Insulated Switchgear that focuses on 550 kV in power generation, transmission, and heavy industry applications, is environmentally friendly and features one of the lowest gas weights on the market and an advanced SF6 sealing system. Complete digital monitoring control and protection capabilities enable the B105 & T155 to be readily integrated into the smart grid.

Additional Benefits:

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

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