

Middle East & Africa Air Insulated Switchgear - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Middle East & Africa Air Insulated Switchgear Market is expected to register a CAGR of greater than 5% during the forecast period.

Key Highlights

- The market was negatively impacted by COVID-19 in 2020. Presently the market has now reached pre-pandemic levels. Over the long term, factors such as increasing investments in transmission and distribution infrastructure are expected to drive the demand for the Middle East and Africa air-insulated switchgear market during the forecast period.
- On the other hand, the adoption of gas-insulated switchgear may restrain the Middle East and African air-insulated switchgear market. Nevertheless, plans to integrate renewable energy with the national grids are expected to create a significant amount of opportunity for the Middle East and Africa air-insulated switchgear market players in the near future.
- South Africa is the fastest-growing country in the Middle East and Africa's air-insulated switchgear market during the forecast period.

Middle East & Africa Air Insulated Switchgear Market Trends

High Voltage Segment to Witness Significant Growth

- The power system that deals with voltage above 36kV is referred to as high voltage switchgear. As the voltage level is high, the arcing produced during the switching operation is also very high. So, special care is to be taken while designing high-voltage

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switchgear. The high-voltage circuit breaker is the main component of high voltage switchgear. Hence high voltage circuit breakers (CB) should have special features for safe and reliable operation.

- This switchgear has multiple usages across 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 a growing number of marine applications. But the main application of the segment comes from large transmission and distribution networks being modernized and built across the globe.
- Also, the growing high-voltage direct current (HVDC) projects are expected to aid the growth of the market with large projects, in December 2021, in the United Arab Emirates, such as the anticipated direct current subsea transmission system, which is expected to power Abu Dhabi National Oil Company's offshore production operations with cleaner and more efficient energy, delivered through the Abu Dhabi onshore power grid, owned and operated by the country's transmission and distribution companies.
- Further, in a major development in 2021, Siemens Energy and Mitsubishi Electric signed a Memorandum of Understanding to conduct a feasibility study on the joint development of high-voltage switching solutions with the prospect of zero global warming potential (GWP). The study is expected to work on substituting greenhouse gases with clean air for insulation. Both companies are expected to research methods for scaling up the application of clean-air insulation technology to higher voltages. However, both partners are expected to continue to manufacture, sell, and service switchgear solutions independently, and only the technology transfer is expected to take.
- In 2022, the total installed renewable energy capacity in the Middle East and Africa region reached 86 GW, recording an increase of over 6.2% compared to the previous year's value. Hence, owing to the above points, High voltage drives the market during the forecast period.

South Africa Expected to Fastest Growing Market

- According to the Ministry of Energy, South Africa's total domestic electricity generation capacity was 58,095 MW as of 2021. About 48,380 MW were thermal power stations, while 8,131 MW electricity was generated from renewable energy sources such as solar, wind, and hydro. In South Africa, conventional thermal power sources are expected to be the dominant electricity generation source during the forecast period; however, its share in total capacity is likely to decrease as a more renewable generation comes online in the coming years.
- Hence, to meet the increasing electricity demand and increase grid stability, Eskom has announced an investment of around ZAR 118 billion under its TDP 2021-30 for the addition of around 5650 km of transmission lines and 41595 MVA of transformer capacity and 83 transformers at the 275 kV, 400 kV and 765 kV voltage levels to South Africa's grid network.
- Further, Eskom has also planned to execute cross-border links, which are likely to connect all the Southern African Power Pool (SAPP) member countries, with the aim of establishing a regional power market. Hence, such projects would create demand for gas-insulated switches in South Africa in the upcoming years.
- In September 2021, South Africa's government approved plans for a more ambitious GHG emissions target. The new target range is 398-510 million metric tons of CO₂ equivalent in 2025 and 350-420 million mt CO₂-equivalent in 2030.
- In the last couple of years, South Africa has witnessed a significant rise in electric demand. However, the power generation is low compared to the demand. Thus, the country is facing severe power blackouts. In 2022, the country is experiencing blackouts for up to six hours a day. Due to this, EPC could play a vital role in South Africa to cater the power crisis. Furthermore, due to frequent blackouts and power outages, South Africa adopted solar energy as an energy alternative, and the country is considered one of the fastest growing countries in the region for solar energy projects.
- This can be described to the government's new energy policy and the South African Renewable Energy Independent Power Producer Procurement Programme, which boosted the overall Middle East and Africa air-insulated switchgear market in the country.

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Middle East & Africa Air Insulated Switchgear Industry Overview

The Middle East and Africa air-insulated switchgear market is moderately fragmented. Some of the key players (not in particular order) are Hitachi Energy Ltd., General Electric Company, Schneider Electric SE, Siemens AG, and Eaton Corporation PLC.

Additional Benefits:

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

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