

## **Middle East and Africa 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 Middle East and Africa High Voltage 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 now reached pre-pandemic levels.

#### Key Highlights

- Over the medium term, increasing electricity generation and consumption, network expansions to accommodate the infrastructure development projects, and integration of renewables into the grid are expected to drive the Middle East and Africa high-voltage switchgear market during the forecast period.
- On the other hand, stringent environmental and safety regulations related to the Middle East and Africa high-voltage switchgear market are restraining factors.
- Nevertheless, expanding power transmission and distribution (T&D) infrastructure to achieve high electricity access rates in the Middle East and Africa region is expected to create significant opportunities for high-voltage switchgear manufacturers.
- Saudi Arabia dominates the high-voltage switchgear market, with the major demand for high-voltage switchgear coming from the rising investment in alternative energy sources.

#### Middle East And Africa High Voltage Switchgear Market Trends

#### Gas-Insulated Switchgear to Witness a Significant Growth

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- Gas-insulated high voltage switchgear (GIS) is closed-packed metal-enclosed switchgear. It comprises high-voltage components, such as circuit breakers and disconnectors. GIS offers numerous advantages, including less field construction work, flexible designs, minimal maintenance, and good reliability and safety.
- In March 2022, GE Renewable Energy's Grid Solutions unveiled the world's first 420 kV, 63 kA g3 gas-insulated substation (GIS) circuit-breaker1 prototype. The g3 circuit breaker was presented to a group of leading transmission utilities.
- GIS is a metal-enclosed switchgear, and it occupies much less space. Gas-tight metal enclosures enclose all the equipment. SF6 is used as insulation between the earthed metal enclosures and live parts of the equipment. GIS can be used in city buildings, roofs and offshore platforms, and industrial and hydropower plants where spaces are limited.
- In 2021, the volume of electricity output in the Middle East was approximately 1305.6 TWh. The region's total electricity output volume in the previous year was about 1243.0 TWh. The increasing power generation is expected to drive the demand for high-voltage switchgear in the region.
- The demand for HVDC transmission systems is expected to supplement further the integration of large-scale renewables located far away from the demand centers in the Middle East and Africa power grid.
- Therefore, with increasing urbanization and industrialization across developing economies, the demand for gas-insulated switchgear is expected to grow significantly during the forecast period.

#### Saudi Arabia to Dominate the Market

- Rapid industrialization and urbanization led to an increase in electricity demand. It, in turn, fueled the need to expand T&D infrastructure across the region, thereby driving the high-voltage switchgear market.
- As per the BP statistics, Saudi Arabia's electricity generation in 2021 stood at 356.5 TWh and is expected to increase further during the forecast period. As a result, there is a need for the expansion of the existing power transmission network, which is expected to drive the demand for high-voltage switchgear in the country.
- Under the Saudi Arabia Vision 2030, the Kingdom seeks to reach 27.3 GW of renewable power capacity by 2023. It includes 20 GW of solar photovoltaic (PV) and 7 GW of wind power and aims at 58.7 GW by 2030, with solar accounting for 40 GW at the end of the decade. It, in turn, will increase the utilization of high-voltage switchgear for transmission and distribution purposes.
- Therefore, owing to the above points, the increasing renewable energy installations and investments in the country are expected to drive the Saudi Arabian high-voltage switchgear market during the forecast period.

#### Middle East And Africa High Voltage Switchgear Industry Overview

The Middle East and Africa high-voltage switchgear markets are moderately fragmented. Some of the major players in the market (in no particular order) include Hitachi Energy Ltd., Schneider Electric SE, General Electric Company, Toshiba Corporation, and Mitsubishi Electric Corporation.

#### Additional Benefits:

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

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