North America Air-Insulated Switchgear - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 90 pages | Mordor Intelligence

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Report description:

The North America Air-Insulated Switchgear Market is expected to register a CAGR of greater than 7% 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 medium term, factors such as increasing investments in transmission and distribution infrastructure are expected to drive the demand for air-insulated switchgear during the forecast period.
- On the other hand, the adoption of gas-insulated switchgear may restrain the market. Nevertheless, plans to integrate renewable energy with the national grids are expected to create a significant amount of opportunity for the switchgear market players in the near future. The United States is the fastest-growing country in the North America air-insulated Switchgear market during the forecast period.

North America Air-Insulated Switchgear Market Trends

Medium Voltage Hold Significant Market Share

- The 3 KV to 36 KV switchgear system is categorized as medium voltage switchgear. This segment is expected to witness significant demand over the forecast period due to the fast improvement in the power transmission and distribution sector owing to investments and the implementation of the technologies such as smart grids and smart meters around the globe.
- Medium voltage switchgear of up to around 35 kVA is used for the protection of wind generators installed at remote locations,

which makes it ideal for locations such as the North Sea and the Gulf of Mexico, where the majority of the new offshore projects are expected to be finalized.
- Canada is expected to replace the older infrastructure and add transmission and distribution lines to increase the electrification rates to meet the electricity demand in rural areas. Besides, the total investment in the transmission and distribution sector is likely to increase in the upcoming years. The capital expenditure in Canada's energy sector was USD 60 billion, with electric power generation and transmission accounting for more than USD 21.2 billion in 2020.
- Furthermore, in June 2021, under the Smart Renewables and Electrification Pathways Program (SREPs), the government of Canada announced CAD 964 million in investment to support smart renewable energy and grid modernization projects. Such initiatives are expected to play a vital role in the growth of the North American air-insulated switchgear market.
- Therefore, based on the above-mentioned factors, the medium voltage segment is likely to witness significant demand during the forecast period.

United States Expected to Dominate the Market

- The United States is the largest electricity market in North America. In 2021, the electricity generated at utility-scale power generation facilities in the country reached 4,116 Terr watthours (TWh). About 61% of this electricity came from fossil fuels (coal, natural gas, petroleum, and other gases), while around 19% was from nuclear energy, and 20% was from renewable power sources.
- Further, the United States Energy Information Administration (EIA) estimated an additional 49 billion kWh of electricity generation from small-scale solar photovoltaic systems in 2021. According to the EIA, the country was expected to increase its electricity generation from 4,116 TWh in 2021 to 4,133.33 TWh in 2022. Further, it aims to increase renewable energy's share in the power generation mix from 20.1% in 2021 to 80% by 2030, followed by 100% renewable electricity by 2035.
- Hence, this indicates that the country's power generation mix is likely to change in the coming years, requiring subsequent developments in the transmission and distribution systems. This scenario is expected to create a massive demand for the North America air-insulated switchgear market during the forecast period. Moreover, the ir-insulated switchgear market is preferable for renewable plants such as solar PV projects where space is a constraint, or the objective is to reduce the ample land space.
- In 2022, the United States had more than 351 GW of electricity-generating capacity from renewable resources. Renewable electricity generation was expected to grow, reaching 2,060 TWh by 2050.
- Investments in electricity transmission and distribution (T&D) networks and smart grid technology are also expected to increase the demand for gas-insulated switch gears. The United States has witnessed increasing investments in the transmission and distribution systems for years, with the annual investments by the utilities in the country spending more on delivering electricity to customers and less on producing the electricity.
- Therefore, factors, such as the increasing demand for electricity, along with the aging grid infrastructure, are expected to drive the demand for air-insulated switchgear in the United States over the forecast period.

North America Air-Insulated Switchgear Industry Overview

The North American switchgear market is moderately fragmented. Some of the key players (not in particular order) are Schneider Electric SE, Siemens AG, Hitachi Energy Ltd., General Electric Company, and Eaton corporation.

Additional Benefits:

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

Table of Contents:

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