

## **Pad Mounted Transformer - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 125 pages | Mordor Intelligence

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### **Report description:**

The Pad Mounted Transformer Market size is estimated at USD 6.12 billion in 2025, and is expected to reach USD 8.04 billion by 2030, at a CAGR of 5.6% during the forecast period (2025-2030).

#### Key Highlights

- Over the medium term, factors such as plans for increasing power generation capacity worldwide, growing demand for replacing/refurbishing aging distribution transformers, and increasing electricity demand are expected to drive the market during the forecast period.
- On the other hand, the increase in adoption of distributed energy generation at the consumer's end is likely to hamper the market's growth.
- Nevertheless, increasing electrification projects in the Middle East & Africa, Asia-Pacific, and several government initiatives are expected to create ample opportunities for pad-mounted transformer market players over the coming years.
- The Asia-Pacific region is expected to dominate the market and will likely register the highest CAGR during the forecast period. China and India drive it due to these countries' growing electricity infrastructure.

#### Pad Mounted Transformer Market Trends

##### Oil-filled Transformer Type to Dominate the Market

- Oil-filled transformers employ liquid cooling and prove ideal for outdoor use, offering increased efficiency, prolonged service life,

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and dependable overload capabilities. Utilizing liquid as a cooling medium, these transformers surpass dry types, with the notable advantage of handling higher ratings and overloads.

- Countries such as India and China are expanding their transmission & distribution network to cater to the rise in electricity demand due to increased urbanization and establishing commercial & industrial hubs, which is expected to drive the oil-filled pad-mounted transformer market.
- For Instance, the Indian government's goal is to electrify every household through the Pradhan Mantri Sahaj Bijli Har Ghar Yojana and improve power supply quality in rural areas via the Deendayal Upadhyaya Gram Jyoti Yojana (DDUGJY) is expected to boost the market for pad-mounted transformers in the forecasted period.
- Oil-filled transformers are preferred as a safe and secure transformer for use in public spaces as they are usually enclosed in a cabinet. Along the same line, due to the roll-out of electric vehicle charging infrastructures in many countries, the installation of oil-filled pad-mounted transformers is undoubtedly expected to increase.
- For instance, in May 2023, LNG Electric announced the launch of an EV charging infrastructure for over 13,000 hotels in the United States. In addition to it, LNG Electric would likely install charging stations in more than forty multifamily community areas. This would undoubtedly give a thrust to the pad-mounted transformers market in the United States.
- Moreover, the rising trend of electricity generation across the globe would also necessitate power utilities to deploy instrument transformers for the safe and reliable operation of transmission lines. As of 2022, the electricity generation was 29,165 TWh, about a 2 % increase from 2021. The gradual growth in electricity generation would help the pad-mounted transformer market grow in the future.
- Hence, owing to the above factors, oil-filled type transformers are expected to dominate the global pad-mounted transformer market during the forecast period.

#### Asia-Pacific to Dominate the Market

- The Asia-Pacific region is anticipated to experience rapid growth, driven by expanding power generation capacities, a surging need to replace/refurbish aging distribution transformers, and rising electricity demand. This growth, spurred by the accelerated development of industrial infrastructure, is notably prominent in China and India.
- Various countries in the region have shifted their focus on increasing the developmental activities in their region, such as increasing the industrial and commercial sectors, which in turn drives the demand for electricity, raising the demand for more efficient electrical infrastructure.
- For instance, according to the State Grid Corp. of China, the country's most significant power utility, investments in power grid infrastructure and related industries are expected to surpass approximately USD 896 billion in 2021-2025, focusing on power transmission, electric vehicle chargers, and new digital infrastructure. This indicated high prospects for developing the pad-mounted transformers market in the country.
- Similarly, in August 2022, the Punjab government approved a USD 308 billion action plan to enhance the caliber and dependability of consumer electricity supply. Various infrastructure projects, including the construction and augmentation of 89 and 382 66/ 11 kV power transformers and the commissioning of 94 new 66 KV sub-stations, will be carried out as part of the plan. The plan also calls for installing 23,687 11KV distribution transformers, laying 15,859 circuit km of HT/LT lines, and laying 2,015 circuit km of 66 kV transmission lines. Hence, this indicates a broad scope for the deployment of pad-mounted transformers in the country.
- Moreover, the growth in renewable energy generation over the years has put the Asia-Pacific region at the forefront. In 2022, the electricity generation was 2003 TWh, an increase of about 18% from the previous year. Renewable energy generation growth and the associated projects would likely increase the instrument transformer market in the Asia-Pacific region.
- Hence, the above factors are likely to supplement the demand for pad-mounted transformers across the Asia-Pacific region during the forecast period.

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## Pad Mounted Transformer Industry Overview

The pad-mounted transformer market is semi-fragmented. Some of the major companies (in no particular order) are ABB Ltd, Siemens Energy AG, Eaton Corporation PLC, Toshiba Corporation, and General Electric Company.

Additional Benefits:

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

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