US Electrical Enclosures - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 163 pages | Mordor Intelligence

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Report description:

The US Electrical Enclosures Market size is estimated at USD 2.10 billion in 2025, and is expected to reach USD 3.08 billion by 2030, at a CAGR of 7.91% during the forecast period (2025-2030).

Key Highlights
- The increasing power and industrial infrastructure, combined with the need for a safe workforce, has led to various safety standards for the equipment in the industries. This has made electrical enclosures a crucial element in industrial and residential applications. The country has increased demand, owing to the growing electric consumption from various end-user segments, especially from the oil and gas, automotive, and power generation segments.
- The National Electrical Manufacturers Association (NEMA), based out of Virginia, United States, established the standards, such as cover, corrosion resistance, ability to protect from rain and submersion, etc. It also classified electrical enclosures based on their performance. The enclosure industry has to follow the regulations as per a specific end-user industry. For instance, the oil and gas industry uses intrinsically safe, fire and explosion-proof enclosures. Over the forecast period, the increasing offshore and onshore oil and gas projects in the country, owing to the National OCS leasing program, are expected to increase the demand for electrical enclosures to avoid or control any incidents from further taking place in the country.
- Oil production in the United States continues to expand rapidly. For instance, ExxonMobil, one of the prominent oil producers in the country, announced its plans to increase the production activity in the Permian Basin of West Texas by producing more than 1 million barrels per day (BPD) oil-equivalent by as early as the year 2024. Similarly, Chevron plans to increase its net oil-equivalent production to reach 900,000 BPD by 2023.
- As the COVID-19 pandemic kept Americans at home, a change in demand for commodities from services stressed supply chains. The virus also affects labor at factories and various stakeholders such as raw material suppliers and manufacturers, resulting in raw material shortages across the electrical enclosure industry. According to the ISM, manufacturing's growth potential has been

hampered by worker absenteeism and short-term shutdowns due to component and labor shortages.

US Electrical Enclosures Market Trends

Commercial spaces and buildings industry to drive the market demand

- It is typical for space to be dedicated to electrical panels and equipment in a commercial building. Often, commercial buildings will have a leading electrical service room and smaller electrical rooms on the other floors. The National Electrical Code requires "clear space," referred to as working space around panelboard, to ensure easy access to overcurrent devices and provide adequate space for maintenance and inspection. The working space will vary as a function of the voltage of the electrical equipment and the surrounding equipment and walls.
- According to US Census Bureau, the value of public construction spending on commercial projects in the United States between 2008 and 2020 varied over time. In 2019, the public sector spent approximately USD 4.3 billion on commercial construction projects. This number had dropped to around USD 3.83 billion by the following year. Currently, private offices, warehouses, and retail/shopping take the primary lead. However, the building construction is moving toward the smart building, which is expected to increase the commercial projects.
- As protection requirements are less severe, a commercial-grade enclosure might be suitable. NEMA 1 is designed for indoor use and protects against incidental contact and dirt. For instance, Hammond Electronics Limited, which supply its enclosure in the United States, has a full NEMA 3R line and is ideal for many outdoor applications.
- Additionally, according to the US Department of Energy (DOE), HVAC, lighting alone consume about 50% of energy use in the average commercial building. Incorporating smart building automation systems, lighting, and HVAC solutions can decrease energy costs between 30% and 50%. According to the United States Energy Information Administration, commercial buildings account for nearly 20% of United States energy consumption and 12% of greenhouse gas emissions. By reducing waste and conserving energy, smart buildings create benefits for the global community. With increasing smart buildings, the market is expected to cater to significant demand.

Industrial segment to hold the highest market share

- Machine and wiring are protected from direct contact with humans and other external bodies, which could otherwise result in an accident or harm human life or the machine. These cabinets must be built according to industry standards to offer enough strength and safety for vital components installed inside.
- Due to environmental regulations, high capital costs, and the latest certification requirements, panel builders and machine manufacturers who predominantly used their facilities found it difficult to run.
- Many manufacturers use the International Electrotechnical Commission (IEC), which establishes a family of electrical enclosure standards, and the Institute of Electrical and Electronics Engineers (IEEE), a technical professional organization that establishes standards to advance technology and benefit humanity. When choosing an enclosure for industrial applications, factors such as material, protection, mounting, climate control, size, modularity, and versatility are considered.
- The National Electrical Manufacturers Association (NEMA) employs a standard rating system to specify the types of settings in which an electrical enclosure can be utilized. It is widely used to indicate a fixed enclosure's ability to tolerate specific environmental conditions.
- NEMA believes that using standards benefits both the user and the manufacturer. It increases the manufacturer-purchaser relationship's safety, economics, and communication. A NEMA standard describes a product in terms of its characteristics and capabilities.

US Electrical Enclosures Industry Overview

The United States Electrical Enclosures Market is fragmented. Industry 4.0, along with the increasing energy consumption in different regions, provides opportunities in the electronic enclosures market. The competitive rivalry among existing competitors is high. Moving forward, the innovation strategies of large companies are driving the electronic enclosures market.

- February 2021 - Legrand AV United States announced its new On-Q Dual-Purpose In-Wall Enclosures. The solutions are offered in 9-inch (ENP0900-NA) and 17-inch (ENP1700-NA) form factors and can be used for AV storage behind a TV or as enclosures for structured wiring. The Dual-Purpose In-Wall Enclosures are designed to house cable boxes, streaming players, and more conveniently.
- December 2020 - At the Innovation Summit North America 2020, Schneider Electric shared its plans for expansion in the United States with USD 40 million projects to upgrade its US manufacturing resources. The company also unveiled a new set of ruggedized data-center enclosures targeting the Industrial Internet of Things (IIoT). Designed for indoor industrial environments, the EcoStruxure Micro Data Center R-Series offers a fast and straightforward way to deploy and manage edge computing infrastructure in a place like a factory floor.

Additional Benefits:

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

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