

**The World Markets
and
Manufacturers of High Voltage
Switchgear
2020 - 2030**

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1. INTRODUCTION

1.1 OBJECTIVES AND SCOPE

The objective of this report is to provide a concise overview of the world market for High Voltage Switchgear. The report gives an estimate of the value of High Voltage Switchgear consumption in each national market, broken down by product type. The data given are 2010-2019 actual market values and estimated 2020 market values; forward projections through to 2025 and 2030 are made on the basis of the infrastructure development in each country over the last 30 years.

For the purposes of this report the High Voltage Switchgear market is defined as comprising fuses/cut-outs; automatic circuit breakers (vac/oil/air/SF6 - including reclosers); vacuum interrupters; isolating (make and break) switches; lightning arresters/limiters/suppressors; discrete panels/bays.

In other words, the report examines transmission and distribution substation components, not including HV Switchgear, capacitors, bus systems or relays. Values will not include application engineering, project management, installation or maintenance costs.

Within this report High Voltage Switchgear has been broken down into seven categories :

- **Fuses** (for a voltage exceeding 1000 volts)
- **Circuit Breakers** (Automatic, for a voltage exceeding 1000 volts but less than 72.5 kV)
- **Circuit Breakers** (Automatic, for a voltage exceeding 72.5 kV)
- **Switches** (Isolating and Make-and-Break, for a voltage exceeding 1000 volts)
- **Distribution and Control Panels** (for a voltage exceeding 1000 volts)
- **Lightning Arresters** (including voltage limiters and surge suppressors, for a voltage exceeding 1000 volts)
- **Other** (Other electrical apparatus for switching or protecting electrical circuits, or for making connections to or in electrical circuits, including boards, panels [including numerical control panels] consoles, desks, cabinets etc. for electric control or the distribution of electricity) for a voltage exceeding 1000 volts.

The market sizes for High Voltage Switchgear are also broken down by voltage, into the following voltage ranges:

- **1 – 49 kV**
- **50 – 150 kV**
- **>150 kV**

The market sizes for High Voltage Switchgear are also broken down by type of use, into the following voltage categories:

- **Switchyards and Major Substations**
- **Overhead Line Gear**
- **Primary Distribution Equipment**
- **Secondary Distribution Equipment**

Distribution switchgear is further segmented into:

- **Distribution Switchgear (Outdoor use)**
- **Distribution Switchgear (Indoor use)**

The market sizes for High Voltage Switchgear are also broken down by type of customer, into the following voltage categories:

- **Utility Companies**
- **Construction and Industry**
- **Rail and Transport**
- **Mining, Marine and Offshore**

The scope for this report is global - that is, every country having a significant customer base for High Voltage Switchgear. The report is designed to be used as a first line planning tool by companies interested in the global market for High Voltage Switchgear, and as a base from which to identify national markets worthy of further investigation.

1.2 METHODOLOGY

Data in the markets report is presented in US dollars (conversion tables are included in the appendices). The salient points of the methodology are as follows:-

- The survey was based primarily on desk research, including a review of available published production and trade statistics. Import and export figures are calculated from national and United Nations' figures for 2010–2019 the most comprehensive and up-to-date statistics available. Market values are assumed to be equal to Production + (Imports - Exports). National production estimates are based on statistics provided by national governments and trade associations. Market sizes for 2020 are estimated by analysing a range of economic indicators together with trends in trade flow and the pattern of market size growth over the period 2005-2019.
- Market values for the period 2021 to 2030 have been estimated based on two separate methodologies. Firstly the past growth rate in market values for each country have been extrapolated and have been compared with general macro-economic indicators such as GDP, GDP growth and inputs to the value added for each economy. Secondly, the development of the electrical power system in each country has been studied to provide indications for future system growth, and hence market growth.
- Market values are at factory gate prices - they reflect the prices for the products by the importer and do not include trade mark-ups and installation costs. It should be noted that published classifications of products, especially with respect to trade statistics, are sometimes inaccurate, as products may be shipped under generic titles. It should also be noted that Goulden Reports chronicles shipments rather than contracts. A contract to supply goods over a number of years will not appear as a one-off event in a Goulden Report, but rather will be recorded from the trade statistics. The nature of the market means that demand within countries, especially developing ones, can fluctuate greatly from year to year as purchases are often made on a one-off basis rather than spread evenly over a number of years.
- Within national markets, where published figures were unavailable to us, the breakdown between different product categories is based on intelligence about the pattern of consumption in the country concerned. In these cases the breakdown is made from an estimate of the total market size rather than the value of the entire market being calculated from the individual product categories.

2. SUMMARY

The global market for HV Switchgear was valued at US\$xxxxx million in 2019 having grown at a cagr of xxx% between 2014 and 2019.

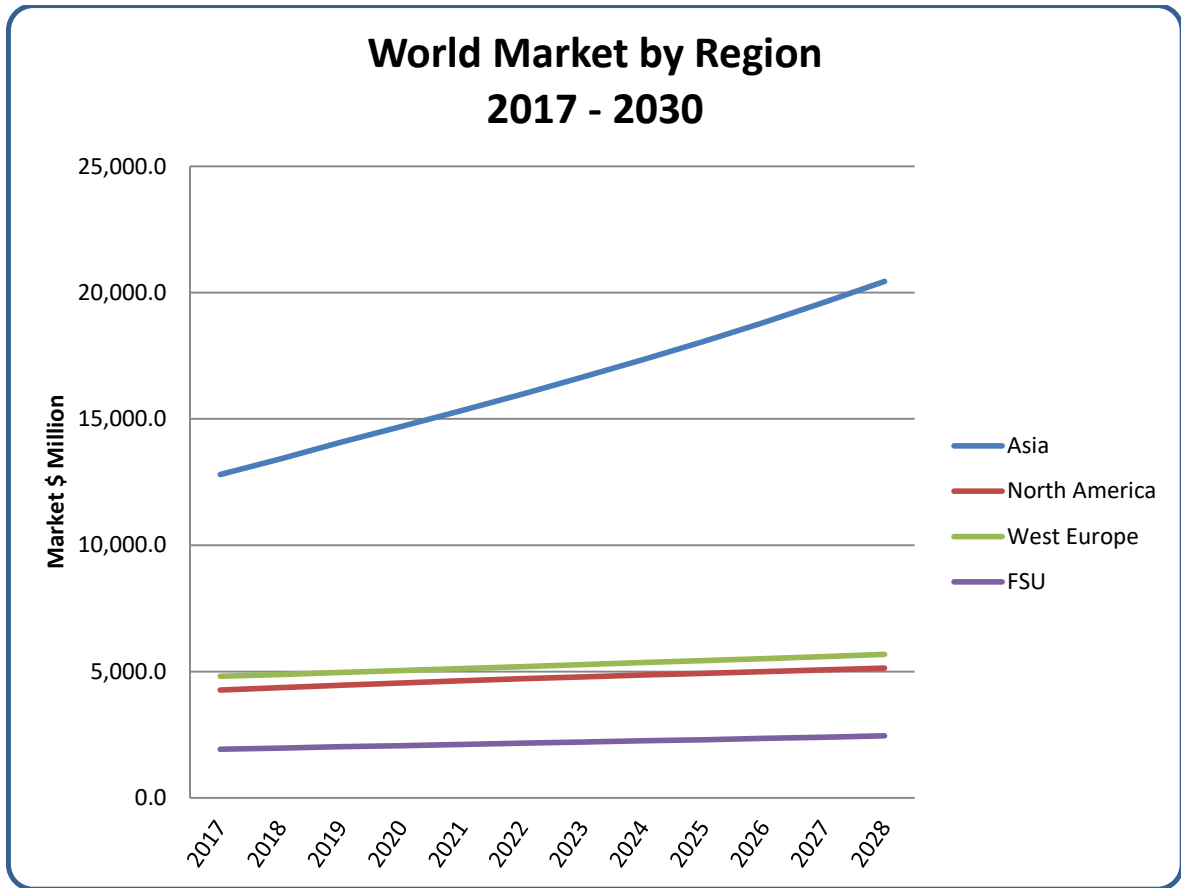
We forecast that the global market will increase at a cagr of xxxx% to reach US\$xxxx million in 2030 – based on 2020 prices.

The largest national market in 2019 was that of China, which was valued at US\$xxxx million and which accounted for nearly xxx% of the overall world market.

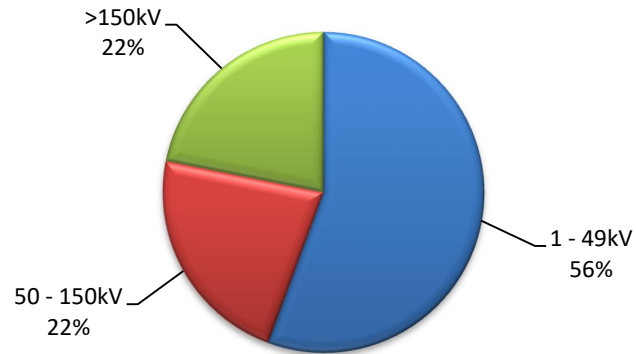
The second largest national market was that of the USA (US\$xxxx million) followed by Japan (US\$xxxxx million) and Russia (US\$xxxxx million).

The largest regional market for HV Switchgear in 2019 was Asia (US\$xxxxx million) followed by Western Europe (US\$xxxx million) and North America (US\$xxxx million) and then the Middle East (US\$xxxxx million).

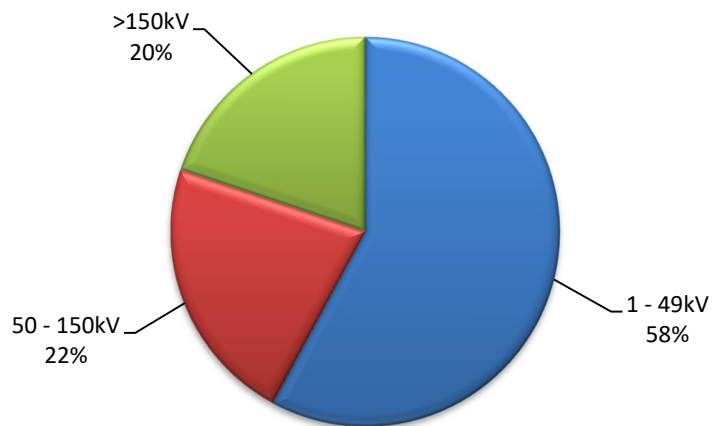
These growth have not been uniform across the globe neither has the consumption of switchgear across the voltage range. The figures are shown in the charts below:-



Market Value by Voltage 2017



Market Value by Voltage 2030



2.1 SUMMARY TABLES

Table 1

The Largest National Markets for HV Switchgear 2019 (US\$ Million)

Country	Market Size 2019	% Global Market
China		
USA		
Japan		
Russia		
Germany		
Saudi Arabia		
India		
France		
Brazil		
UK		
United Arab Emirates		
Canada		
Korea, South		
Indonesia		
Malaysia		
Taiwan		
Thailand		
Singapore		
Mexico		
Hungary		
Sub Total		
Others		
Total		

Source: Goulden Reports and United Nations

Table 2

The Largest National Markets for HV Switchgear 2020 (US\$ Million)

Country	Market Size 2020	% Global Market
China		
USA		
Japan		
Russia		
Germany		
Saudi Arabia		
India		
France		
Brazil		
UK		
United Arab Emirates		
Canada		
Indonesia		
Korea, South		
Malaysia		
Taiwan		
Thailand		
Singapore		
Mexico		
Hungary		
Sub Total		
Others		
Total		

Source: Goulde Reports and United Nations

Table 3

The Largest National Markets for HV Switchgear 2025 (US\$ Million)

Country	Market Size 2025	% Global Market
China		
USA		
Japan		
Russia		
Germany		
Saudi Arabia		
India		
France		
Brazil		
UK		
United Arab Emirates		
Canada		
Indonesia		
Malaysia		
Korea, South		
Taiwan		
Thailand		
Philippines		
Mexico		
Singapore		
Sub Total		
Others		
Total		

Source: Goulden Reports and United Nations

Table 4

The Largest National Markets for HV Switchgear 2030 (US\$ Million)

Country	Market Size 2030	% Global Market
China		
USA		
Japan		
India		
Russia		
Saudi Arabia		
Germany		
Brazil		
France		
UK		
Indonesia		
United Arab Emirates		
Malaysia		
Canada		
Korea, South		
Philippines		
Thailand		
Taiwan		
Pakistan		
Singapore		
Sub Total		
Others		
Total		

Source: Goulden Reports and United Nations

3. THE WORLD MARKET

3.1 WORLD MARKET 2015 TO 2020

Table 5

The World Market for HV Switchgear, by Region, 2015- 2020 (US\$ Million)

Region	2015	2016	2017	2018	2019	2020e
W Europe						
E Europe						
FSU						
N Africa						
W Africa						
C Africa						
E Africa						
S Africa						
M East						
Indian Sub Con						
Asia						
S America						
C America & Carrib						
N America						
Australasia						
World						

Source: Goulden Reports and United Nations

Table 6

The World Market for HV Switchgear, by Region, 2015 - 2020 (% Change)

Region	2016/2015	2017/2016	2018/2017	2019/2018	2020/2019
W Europe					
E Europe					
FSU					
N Africa					
W Africa					
C Africa					
E Africa					
S Africa					
M East					
Indian Sub Con					
Asia					
S America					
C America & Carrib					
N America					
Australasia					
World					

Source: Goulden Reports and United Nations

Table 7

The World Market for HV Switchgear, by Region, by Equipment Type 2019 (US\$ Million)

Region	Fuses	ACB's 1 to 72.5kV	ACB's > 72.5kV	Switches	Lightning Arresters	Other Equip't	Panels	Total million (\$)
W Europe								
E Europe								
FSU								
N Africa								
W Africa								
C Africa								
E Africa								
S Africa								
M East								
Indian Sub Con								
Asia								
S America								
C America & Carrib								
N America								
Australasia								
Total								

Source: Goulden Reports and United Nations

Table 8

The World Market for HV Switchgear, by Region, by Voltage Level 2019 (US\$ Million)

Region	1 – 50kV	50 to 150kV	Over 150kV	Total
W Europe				
E Europe				
FSU				
N Africa				
W Africa				
C Africa				
E Africa				
S Africa				
M East				
Indian Sub Con				
Asia				
S America				
C America & Carrib				
N America				
Australasia				
Total				

Source: Goulden Reports and United Nations

Table 9

The World Market for HV Distribution Switchgear, by Region, by Location 2019 (US\$ Million)

Region	Distribution Switchgear Outdoor	Distribution Switchgear Indoor	Total
W Europe			
E Europe			
FSU			
N Africa			
W Africa			
C Africa			
E Africa			
S Africa			
M East			
Indian Sub Con			
Asia			
S America			
C America & Carrib			
N America			
Australasia			
Total			

Source: Goulden Reports and United Nations

Table 10

The World Market for HV Switchgear, by Region, by Type of Use 2019 (US\$ Million)

Region	S/yards & Major Subst'ns.	Overhead Line Gear	Primary Dist'ution Equipment	Secondary Dist'ution Equipment	Total
W Europe					
E Europe					
FSU					
N Africa					
W Africa					
C Africa					
E Africa					
S Africa					
M East					
Indian Sub Con					
Asia					
S America					
C America & Carrib					
N America					
Australasia					
Total					

Source: Goulden Reports and United Nations

Table 11

The World Market for HV Switchgear, by Region, by End Use Customer 2019 (US\$ Million)

Region	Utility Organisations	Construction & Industry	Rail & Transport	Mining, Marine & Offshore	Total
W Europe					
E Europe					
FSU					
N Africa					
W Africa					
C Africa					
E Africa					
S Africa					
M East					
Indian Sub Con					
Asia					
S America					
C America & Carrib					
N America					
Australasia					
Total					

Source: Goulden Reports and United Nations

Table 12

The World Market for HV Switchgear, by Technology 2019 (US\$ Million)

Region	GIS Substations	GIS Breakers	AIS Switchgear	Other	Total
W Europe					
E Europe					
FSU					
N Africa					
W Africa					
C Africa					
E Africa					
S Africa					
M East					
Indian Sub Con					
Asia					
S America					
C America & Carrib					
N America					
Australasia					
Total					

Source: Goulden Reports and United Nations

3.2 FORECAST WORLD MARKET 2020 - 2030

Table 13

The Forecast World Market for HV Switchgear, by Region, 2020 to 2030 (US\$ Million)

Region	2018	2019	2020	2025	2030
W Europe					
E Europe					
FSU					
N Africa					
W Africa					
C Africa					
E Africa					
S Africa					
M East					
Indian Sub Con					
Asia					
S America					
C America & Carrib					
N America					
Australasia					
Total					

Source: Goulden Reports

Table 14

The Forecast World Market for HV Switchgear, by Region, 2020 to 2030 (% Change)

Region	2018/17	2019/18	2020/19	2025/20 cagr	2030/2025 cagr	2030/20 cagr
Western Europe						
Eastern Europe						
Former USSR						
North Africa						
West Africa						
Central Africa						
East Africa						
Southern Africa						
Middle East						
Indian Sub Continent						
Asia						
South America						
Cent. America & Carib.						
North America						
Oceania						
Total						

Source: Goulden Reports

Table 15

The World Market for HV Switchgear, by Region, by Equipment Type 2030 (US\$ Million)

Region	Fuses	ACB's 1 to 72.5kV	ACB's > 72.5kV	Switches	Lightning Arresters	Other Equip'nt	Panels	Total million (\$)
Western Europe								
Eastern Europe								
Former USSR								
North Africa								
West Africa								
Central Africa								
East Africa								
Southern Africa								
Middle East								
Indian Sub Continent								
Asia								
South America								
Cent. America & Carib.								
North America								
Oceania								
Total								

Source: Goulden Reports and United Nations

Table 16

The World Market for HV Switchgear, by Region, by Voltage Level 2030 (US\$ Million)

Region	1 – 50kV	50 to 150kV	Over 150kV	Total
Western Europe				
Eastern Europe				
Former USSR				
North Africa				
West Africa				
Central Africa				
East Africa				
Southern Africa				
Middle East				
Indian Sub Continent				
Asia				
South America				
Cent. America & Carib.				
North America				
Oceania				
Total				

Source: Goulden Reports and United Nations

Table 17

The World Market for HV Distribution Switchgear, by Region, by Location 2030 (US\$ Million)

Region	Distribution Switchgear Outdoor	Distribution Switchgear Indoor	Total
Western Europe			
Eastern Europe			
Former USSR			
North Africa			
West Africa			
Central Africa			
East Africa			
Southern Africa			
Middle East			
Indian Sub Continent			
Asia			
South America			
Cent. America & Carib.			
North America			
Oceania			
Total			

Source: Goulden Reports and United Nations

Table 18

The World Market for HV Switchgear, by Region, by Type of Use 2030 (US\$ Million)

Region	S/yards & Major Subst'ns.	Overhead Line Gear	Primary Dist'ution Equipment	Secondary Dist'ution Equipment	Total
Western Europe					
Eastern Europe					
Former USSR					
North Africa					
West Africa					
Central Africa					
East Africa					
Southern Africa					
Middle East					
Indian Sub Continent					
Asia					
South America					
Cent. America & Carib					
North America					
Oceania					
Total					

Source: Goulden Reports and United Nations

Table 19

The World Market for HV Switchgear, by Region, by End Use Customer 2030 (US\$ Million)

Region	Utility Organisations	Construction & Industry	Rail & Transport	Mining, Marine & Offshore	Total
Western Europe					
Eastern Europe					
Former USSR					
North Africa					
West Africa					
Central Africa					
East Africa					
Southern Africa					
Middle East					
Indian Sub Continent					
Asia					
South America					
Cent. America & Carib.					
North America					
Oceania					
Total					

Source: Goulden Reports and United Nations

Table 20

The World Market for HV Switchgear, by Technology 2030 (US\$ Million)

Region	GIS Substations	GIS Breakers	AIS Switchgear	Other	Total
Western Europe					
Eastern Europe					
Former USSR					
North Africa					
West Africa					
Central Africa					
East Africa					
Southern Africa					
Middle East					
Indian Sub Continent					
Asia					
South America					
Cent. America & Carib.					
North America					
Oceania					
Total					

Source: Goulden Reports and United Nations

4. MAJOR MANUFACTURERS OF HV SWITCHGEAR

4.1 MAJOR MANUFACTURERS SALES BY REGION

The figures in this section are from published annual company reports and other official sources. The figures are, however, designed to serve as a general overview – inaccuracies may occur as a result of exchange rate fluctuations or insufficient primary data.

Table 21

Leading Manufacturers' Sales of HV Switchgear, per Region, 2019 (US\$ Million)

Company	Western Europe	Eastern Europe & Former USSR	Africa	Middle East
ABB				
BHEL				
CG				
Eaton				
Fuji				
GE				
Hitachi				
Hyundai Heavy Ind				
Meidensha				
Mitsubishi Electric				
Nissin				
Ormazabal				
S&C				
Schneider				
Siemens				
Toshiba				
Sub-Total				
Others				
Total				

continued...

Table 22

Leading Manufacturers' Sales of HV Switchgear, per Region, 2019 (US\$ Million) - continued

Company	Asia-Pacific	North America	South & Central America & Caribbean	Total
ABB				
BHEL				
CG				
Eaton				
Fuji				
GE				
Hitachi				
Hyundai Heavy Ind				
Meidensha				
Mitsubishi Electric				
Nissin				
Ormazabal				
S&C				
Schneider				
Siemens				
Toshiba				
Sub-Total				
Others				
Total				

Source: Goulden Reports

4.2 HV Switchgear Industry Contact Details

4.3 Argentina

GE formerly Alstom Grid SA	Avda Leandro N. Alem 896, Piso 5 1001 Buenos Aires Argentina	Tel: +54 11 4891 9600 Fax: +54 11 4311 1040
EatonArgentina	Calle Reconquista 656 Piso Buenos Aires Argentina	Tel: +54 11 4315 4066 Fax: +54 11 4314 8946
Hitachi Argentina SA	Carlos Pellegrini 1363, Piso 1 1011 Buenos Aires Argentina	Tel: +54 11 4394 5452 Fax: +54 11 4394 5416
Mitsubishi Argentina SA	Florida 890-20 Piso 1005 Buenos Aires Argentina	Tel: +54 1 311 4549 Fax: +54 1 311 4801
Eaton MElectric SA	Habana 3346 1419 Buenos Aires Argentina	Tel: +54 11 45 74 04 11 Fax: +54 11 45 74 48 17
Polet Srl	Calle 31, 3271/73 San Andres 1651 Buenos Aires Argentina	Tel: +54 1 754 1221 Fax: +54 1 754 1221
Siemens SA	Calle No 122, 4785, Ruta 8, Km 18 Casilla De Correo 32 1650 San Martin, Prov. De Buenos Aires Argentina	Tel: +54 11 47 38 71 00 Fax: +54 11 47 38 71 71
Siemens SA	Casilla De Correo 12 32 1000 Buenos Aires Argentina	Tel: +54 11 43 40 84 00 Fax: +54 11 43 31 99 97
Telsin Srl	Moldes 1971, Floor 286 1428 Buenos Aires Argentina	Tel: +54 1 785 7754 Fax: +54 1 785 7754
Siemens Argentina SA	Av Cordoba 1561, Piso 12 1055 Buenos Aires Argentina	Tel: +54 1 815 3964 Fax: +54 1 815 3968

4.4 Australia

ABB Pty Ltd	Po Box R 1406, Royal Exchange Level 20, Gold Fields House 1 Alfred Street Sydney, Nsw 2000 Australia	Tel: +61 2 9255 3999 Fax: +61 2 9255 3988
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GE formerly Alstom Grid Australia	35, Evans Road Rocklea, Brisbane Queensland 4106 Australia	Tel: +61 7 3274 7700 Fax: +61 7 3277 7699
GE formerly Alstom Grid Australia Ltd	Po Box 319 North Ryde Nsw 1670 Australia	Tel: +61 2 9367 4333 Fax: +61 2 9367 4366
GE formerly Alstom Grid Australia Ltd	3 Bridge Street Pymble Nsw 2073 Australia	Tel: +61 2 9488 4888 Fax: +61 2 9488 4822
Bovara Pty Ltd	Po Box 250 Botany Bay Nsw 2019 Australia	Tel: +61 2 666 4199 Fax: +61 2 666 5062
Eaton/Cooper Power Systems	205-207 Woodpark Road Po Box 2577 Smithfield, Nsw 2164 Australia	Tel: +61 2 8787 2779 Fax: +61 2 9609 2746
Dulhunty Industries Pty Ltd	11 Hilly Street Mortlake N.S.W.2137 Australia	Tel: +61 2 9736 3244 Fax: +61 2 9736 3312
Epe - Excess Power Equipment Pty Ltd	27-29 Mandarin Road Maddington Wa 6109 Australia	Tel: +61 8 9493 3077 Fax: +61 8 9493 2336
EPS - Electric Parts Supplies	Po Box 441 Cloverdale Wa 6985 Australia	Tel: +61 8 9472 9202 Fax: +61 8 9472 9203
GE Power Controls	5/25 Isabella Street N. Parramatta Nsw 2151 Australia	Tel: +61 2 9630 7529 Fax:
Eaton Electric - Holec Pty Ltd	1-5 Carter Street HomebushBay Nsw 2127 Australia	Tel: +61 2 9364 1709 Fax: +61 2 9748 3536
Eaton MElectric Pty Ltd	40 Guthrie Street OsbornePark Western Australia 6017 Australia	Tel: +61 8 92 44 26 33 Fax: +61 8 92 44 26 34
Eaton MElectric Pty Ltd	4 Caribbean Drive Scoresby Victoria 3179 Australia	Tel: +61 3 98 39 11 00 Fax: +61 3 98 39 11 77
NGK Stanger Pty Ltd	Po Box 447 6-7 Pitt Street Reservoir Victoria 3073 Australia	Tel: +61 3 9469 6200 Fax:

NHP Electrical Engineering Products Pty Ltd	43-67 River Street Richmond Victoria 3121 Australia	Tel: +61 3 9429 2999 Fax: +61 3 9429 1075
Schneider - Nu-Lec	46 Aaron Avenue Hawthorne Queensland 4171 Australia	Tel: +61 7 339 35999 Fax: +61 7 339 35144
Schneider - Nu-Lec Pty Ltd	35-37 South Street Lytton, Brisbane Queensland 4178 Australia	Tel: +61 7 3393 5999 Fax: +61 7 3393 5144
Schneider Pty Ltd	2 Solent Circuit NorthwestBusinessPark Balkham Hills, Nsw 2153 Australia	Tel: +61 2 9603 0888 Fax: +61 2 9629 8555
Schneider Pty Ltd Manufacturing Division	Sydney Road Po Box 122 Benalla 3672 Benalla, Victoria 3692 Australia	Tel: +61 3 5762 3411 Fax: +61 3 5762 5113
Siemens Ltd	Locked Bag 2500 North Ryde Nsw 1670 Australia	Tel: +61 2 9491 9320 Fax: +61 2 9491 7935
Siemens Ltd	885 Mountain Highway Bayswater Victoria 3153 Australia	Tel: +61 13 72 22 Fax: +61 13 00 36 02 22
Toshiba Australia Pty Ltd	Po Box 350 North Ryde Nsw 2113 Australia	Tel: +61 2 9887 6000 Fax: +61 2 9887 3201

4.5 Austria

ABB AG	Wienerbergstrasse 11b 1100 Wien Austria	Tel: +43 1 601 090 Fax: +43 1 601 098910
Dietzel-Univolt GmbH	1 Haidequerstrasse 3-5 Postfach 50 111 Wien Austria	Tel: +43 1 222 764545 Fax: +43 1 222 767686
Felten & Guillaume Austria AG	Eugenia 1 3943 Schrems Austria	Tel: +43 2853 702 0 Fax: +43 2853 76509
Kuvag Kunststoffverarbeitungs GmbH	Dragonstrasse 2 Postfach 38 4720 Neumark/H Austria	Tel: +43 7733 74680 Fax: +43 7733 756128

ENTRIES CONTINUE FOR EACH COUNTRY

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5. REGIONAL MARKETS

5.1 WESTERN EUROPE

Table 23

Western Europe The Market for HV Switchgear, by Country, 2015 – 2020 (US\$ Million)

Country	2015	2016	2017	2018	2019	2020e
Austria						
Belgium						
Cyprus						
Denmark						
Finland						
France						
Germany						
Greece						
Iceland						
Ireland						
Italy						
Luxembourg						
Malta						
Netherlands						
Norway						
Portugal						
Spain						
Sweden						
Switzerland						
UK						
Total						

Source: Goulden Reports and United Nations

Table 24

Western Europe: The Market for HV Switchgear, by Country, 2015 – 2020 (% Change)

Country	2016/2015	2017/2016	2018/2017	2019/2018	2020/2019
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
UK					
Total					

Source: Goulden Reports and United Nations

Table 25

Western Europe: The Market for HV Switchgear, by Country, by Equipment Type 2019 (US\$ Million)

Country	Fuses	ACB's 1 to 72.5kV	ACB's > 72.5kV	Switches	Lightning Arresters	Other Equip'nt	Panels
Austria							
Belgium							
Cyprus							
Denmark							
Finland							
France							
Germany							
Greece							
Iceland							
Ireland							
Italy							
Luxembourg							
Malta							
Netherlands							
Norway							
Portugal							
Spain							
Sweden							
Switzerland							
UK							
Total							

Source: Goulden Reports and United Nations

Table 26

Western Europe: The Market for HV Switchgear, by Country, by Voltage 2019 (US\$ Million)

Country	1 – 50kV	50 to 150kV	Over 150kV	Total
Austria				
Belgium				
Cyprus				
Denmark				
Finland				
France				
Germany				
Greece				
Iceland				
Ireland				
Italy				
Luxembourg				
Malta				
Netherlands				
Norway				
Portugal				
Spain				
Sweden				
Switzerland				
United Kingdom				
Total				

Source: Goulden Reports and United Nations

Table 27

Western Europe: The Market for HV Distribution Switchgear, by Country, by Location 2019 (US\$ Million)

Country	Distribution Switchgear Outdoor	Distribution Switchgear Indoor	Total
Austria			
Belgium			
Cyprus			
Denmark			
Finland			
France			
Germany			
Greece			
Iceland			
Ireland			
Italy			
Luxembourg			
Malta			
Netherlands			
Norway			
Portugal			
Spain			
Sweden			
Switzerland			
United Kingdom			
Total			

Source: Goulden Reports and United Nations

Table 28

Western Europe: The Market for HV Switchgear, by Country, by Type of Use 2019 (US\$ Million)

Country	S/yards & Major Subst'ns.	Overhead Line Gear	Primary Dist'ution Equipment	SecondaryDist'ution Equipment	Total
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
United Kingdom					
Total					

Source: Goulden Reports and United Nations

Table 29

Western Europe Market for HV Switchgear, by Technology 2019 (US\$ Million)

Region	GIS Substations	GIS Breakers	AIS Switchgear	Other	Total
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
United Kingdom					
Total					

Source: Goulden Reports and United Nations

Table 30

Western Europe: The Market for HV Switchgear, by Country, by End Use Customer 2019 (US\$ Million)

Country	Utility Organisations	Construction & Industry	Rail & Transport	Mining, Marine & Offshore	Total
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
United Kingdom					
Total					

Source: Goulden Reports and United Nations

Table 31

Western Europe: The Market for HV Switchgear, by Country, 2020 to 2030 (US\$ Million)

Country	2018	2019	2020	2025	2030
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
United Kingdom					
Total					

Source: Goulden Reports and United Nations

Table 32

Western Europe: The Market for HV Switchgear, by Country, 2020 to 2030 (% Change)

Country	2018/17	2019/18	2020/19	2025/20 cagr	2030/2025 cagr	2030/20 cagr
Austria						
Belgium						
Cyprus						
Denmark						
Finland						
France						
Germany						
Greece						
Iceland						
Ireland						
Italy						
Luxembourg						
Malta						
Netherlands						
Norway						
Portugal						
Spain						
Sweden						
Switzerland						
United Kingdom						
Total						

Source: Goulden Reports and United Nations

Table 33

Western Europe: The Market for HV Switchgear, by Country, by Equipment Type 2030 (US\$ Million)

Country	Fuses	ACB's 1 to 72.5kV	ACB's > 72.5kV	Switches	Lightning Arresters	Other Equip'nt	Panels
Austria							
Belgium							
Cyprus							
Denmark							
Finland							
France							
Germany							
Greece							
Iceland							
Ireland							
Italy							
Luxembourg							
Malta							
Netherlands							
Norway							
Portugal							
Spain							
Sweden							
Switzerland							
UK							
Total							

Source: Goulden Reports and United Nations

Table 34

Western Europe: The Market for HV Switchgear, by Country, by Voltage 2030 (US\$ Million)

Country	1 – 50kV	50 to 150kV	Over 150kV	Total
Austria				
Belgium				
Cyprus				
Denmark				
Finland				
France				
Germany				
Greece				
Iceland				
Ireland				
Italy				
Luxembourg				
Malta				
Netherlands				
Norway				
Portugal				
Spain				
Sweden				
Switzerland				
United Kingdom				
Total				

Source: Goulden Reports and United Nations

Table 35

Western Europe: The Market for HV Distribution Switchgear, by Country, by Location 2030 (US\$ Million)

Country	Distribution Switchgear Outdoor	Distribution Switchgear Indoor	Total
Austria			
Belgium			
Cyprus			
Denmark			
Finland			
France			
Germany			
Greece			
Iceland			
Ireland			
Italy			
Luxembourg			
Malta			
Netherlands			
Norway			
Portugal			
Spain			
Sweden			
Switzerland			
United Kingdom			
Total			

Source: Goulde Reports and United Nations

Table 36

Western Europe: The Market for HV Switchgear, by Country, by Type of Use 2030 (US\$ Million)

Country	S/yards & Major Subst'ns.	Overhead Line Gear	Primary Dist'ution Equipment	Secondary Dist'ution Equipment	Total
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
United Kingdom					
Total					

Source: Goulden Reports and United Nations

Table 37

Western Europe: The Market for HV Switchgear, by Country, by End Use Customer 2030 (US\$ Million)

Country	Utility Organisations	Construction & Industry	Rail & Transport	Mining, Marine & Offshore	Total
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
United Kingdom					
Total					

Source: Goulden Reports and United Nations

Table 38

Western Europe The Market for HV Switchgear, by Technology 2030 (US\$ Million)

Region	GIS Substations	GIS Breakers	AIS Switchgear	Other	Total
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
United Kingdom					
Total					

Source: Goulden Reports and United Nations

5.2 EASTERN EUROPE

SAME TABLES AS PER WESTERN EUROPE

5.3 FORMER SOVIET UNION

SAME TABLES AS PER WESTERN EUROPE

5.4 NORTH AFRICA

SAME TABLES AS PER WESTERN EUROPE

5.5 WEST AFRICA

SAME TABLES AS PER WESTERN EUROPE

5.6 CENTRAL AFRICA

SAME TABLES AS PER WESTERN EUROPE

5.7 EAST AFRICA

SAME TABLES AS PER WESTERN EUROPE

5.8 SOUTHERN AFRICA

SAME TABLES AS PER WESTERN EUROPE

5.9 MIDDLE EAST

SAME TABLES AS PER WESTERN EUROPE

5.10 INDIAN SUB CONTINENT

SAME TABLES AS PER WESTERN EUROPE

5.11 ASIA

SAME TABLES AS PER WESTERN EUROPE

5.12 SOUTH AMERICA

SAME TABLES AS PER WESTERN EUROPE

5.13 CENTRAL AMERICA AND CARIBBEAN

SAME TABLES AS PER WESTERN EUROPE

5.14 NORTH AMERICA

SAME TABLES AS PER WESTERN EUROPE

5.15 OCEANIA

SAME TABLES AS PER WESTERN EUROPE

6. PRODUCTION

Table 39

The Top 25 Producers of HV Switchgear, 2019 (US\$ Million)

Country	Production	% share
Others		
Total		

Source: Goulden Reports and United Nations

7. TRADE ANALYSIS

7.1 TOP 25 EXPORTERS

Table 40

The Top 25 Exporters of HV Switchgear, 2017 to 2019 (US\$ Millions)

Country	2017 to 2019Av.	Value 2019	% Total 2019
<div data-bbox="354 1671 418 1703" data-label="Text"> <p>Other</p> </div>			
<div data-bbox="354 1761 418 1793" data-label="Text"> <p>Total</p> </div>			

Source: Goulden Reports and United Nations

Table 41

The Top 25 Exporters of HV Fuses, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 42

The Top 25 Exporters of HV Circuit Breakers 1-72.5kV, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 43

The Top 25 Exporters of HV Circuit Breakers >72.5kV, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 44

The Top 25 Exporters of HV Switches, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 45

The Top 25 Exporters of Lightning Arresters, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 46

The Top 25 Exporters of Other HV Apparatus, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 47

The Top 25 Exporters of HV Distribution Boards and Panels, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 49

The Top 25 Importers of HV Fuses, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 50

The Top 25 Importers of HV Circuit breakers 1 to 72.5kV, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 51

The Top 25 Importers of HV Circuit Breakers >72.5kV, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 52

The Top 25 Importers of HV Switches, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 53

The Top 25 Importers of HV Lightning Arresters, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 54

The Top 25 Importers of Other HV Apparatus, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

Table 55

The Top 25 Importers of HV Distribution Boards and Panels, 2019(US\$ Thousands)

Country	Value	% of World Total
---------	-------	------------------

7.3 EXPORT VALUES

Table 56 to 288

**Exporters of HV Switchgear by Type,
2017 to 2019 Averaged (US\$ Thousands)**

Country	1	2	3	4	5	6	7	8
Afghanistan								
Albania								
Algeria								
Angola								
Argentina								
Armenia								
Australia								
Austria								
Azerbaijan								
Bahamas								
Bahrain								
All countries Down to:-								
Venezuela								
Vietnam								
Yemen								
Zambia								
Zimbabwe								

Source: Goulden Reports and United Nations

Key

1 = Fuses

2 = Circuit breakers 1 to 72.5kV

3 = Circuit breakers over 72.5kV

4 = Switches

5 = Lightning Arresters

6 = Other apparatus

7 = Distribution Boards & panels

8 = Total

Table 58

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
China – France, 2019 (% by Value)**

	China		Czech Rep		France
--	--------------	--	------------------	--	---------------

Table 59

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Germany - India, 2019 (% by Value)**

	Germany		Hungary		India
--	----------------	--	----------------	--	--------------

Table 60

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Italy – Korea South, 2019 (% by Value)**

	Italy		Japan		Korea South
--	--------------	--	--------------	--	--------------------

Table 61

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Malaysia - Netherlands, 2019 (% by Value)**

	Malaysia		Mexico		Netherlands
--	-----------------	--	---------------	--	--------------------

Table 62

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Norway – Portugal, 2019 (% by Value)**

	Norway		Poland		Portugal
--	---------------	--	---------------	--	-----------------

Table 63

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Singapore - Sweden, 2019 (% by Value)**

	Singapore		Spain		Sweden
--	------------------	--	--------------	--	---------------

Table 64

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Switzerland - Turkey, 2019 (% by Value)**

	Switzerland		Turkey
--	--------------------	--	---------------

Table 65

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
UK - USA, 2019 (% by Value)**

	UK		USA
--	-----------	--	------------

7.5 IMPORT VALUES

Table 66 to 306

**Importers of HV Switchgear by Type,
2017 to 2019 Averaged (US\$ Thousands)**

Country	1	2	3	4	5	6	7	8
Afghanistan								
Albania								
Algeria								
Angola								
Argentina								
Armenia								
Australia								
Austria								
Azerbaijan								
Bahamas								
Bahrain								
All countries Down to:-								
Venezuela								
Vietnam								
Yemen								
Zambia								
Zimbabwe								

Source: Goulden Reports and United Nations

Key

1 = Fuses

2 = Circuit breakers 1 to 72.5kV

3 = Circuit breakers over 72.5kV

4 = Switches

5 = Lightning Arresters

6 = Other apparatus

7 = Distribution Boards & panels

8 = Total

7.5.1 HV Switchgear Imports by Region, by Country 2014 to 2019

Table 67

Imports of HV Switchgear, Western Europe, by Country,
2014 to 2019 Values (US\$ Million)

Country	2014	2015	2016	2017	2018	2019
Austria						
Belgium						
Cyprus						
Denmark						
Finland						
France						
Germany						
Greece						
Iceland						
Ireland						
Italy						
Luxembourg						
Malta						
Netherlands						
Norway						
Portugal						
Spain						
Sweden						
Switzerland						
UK						
Total						

Source: Goulden Reports and United Nations

Table 68

**Imports of HV Switchgear, Eastern Europe, by Country,
2014 to 2019 Values (US\$ Million)**

Table 69

**Imports of HV Switchgear, Former Soviet Union, by Country,
2014 to 2019 Values (US\$ Million)**

Table 70

**Imports of HV Switchgear, North Africa, by Country,
2014 to 2019 Values (US\$ Million)**

Table 71

**Imports of HV Switchgear, Western Africa, by Country,
2014 to 2019 Values (US\$ Million)**

Table 72

**Imports of HV Switchgear, Central Africa, by Country,
2014 to 2019 Values (US\$ Million)**

Table 73

**Imports of HV Switchgear, East Africa, by Country,
2014 to 2019 Values (US\$ Million)**

Table 74

**Imports of HV Switchgear, Southern Africa, by Country,
2014 to 2019 Values (US\$ Million)**

Table 75

**Imports of HV Switchgear, Middle East, by Country,
2014 to 2019 Values (US\$ Million)**

Table 76

**Imports of HV Switchgear, Indian Sub-Continent, by Country,
2014 to 2019 Values (US\$ Million)**

Table 77

**Imports of HV Switchgear, Asia, by Country,
2014 to 2019 Values (US\$ Million)**

Table 78

**Imports of HV Switchgear, South America, by Country,
2014 to 2019 Values (US\$ Million)**

Table 79

**Imports of HV Switchgear, C America & Caribbean, by Country,
2014 to 2019 Values (US\$ Million)**

Table 80

**Imports of HV Switchgear, North America, by Country,
2014 to 2019 Values (US\$ Million)**

Table 81

**Imports of HV Switchgear, Australasia, by Country,
2014 to 2019 Values (US\$ Million)**

8. APPENDICES

8.1 EXCHANGE RATES

Table 82

Exchange Rates for Major Currencies against US Dollar 2014-2020

Currency	2014	2015	2016	2017	2018	2019	2020
Argentinean Peso							
Australian Dollar							
Brazilian Real							
British Pound							
Canadian Dollar							
Chinese Yuan							
Czech Koruna							
Danish Kroner							
Egyptian Pound							
Euro							
Hong Kong Dollar							
Indian Rupee							
Indonesian Rupiah							
Israeli Shekel							
Japanese Yen							
Malaysian Ringgit							
Mexican Peso							
New Zealand Dollar							
Nigerian Nair							
Norwegian Kroner							
Polish Zloty							
Russian Rouble							
Saudi Riyal							
South African Rand							
South Korean Won							
Swedish Kroner							
Swiss Franc							
Taiwanese Dollar							
Thai Baht							
Turkish Lira	1.68	1.80	1.91	2.32	2.92	3.31	3.68

Average rates January to December

Source: OANDA, UK Gov and Goulden Reports

8.2 ESTIMATED PRODUCTION BY COMPANY BY COUNTRY

The estimates below are a third attempt to complete such an analysis worldwide. As with the first edition Reports would welcome any feedback, amendments and corrections to this table.

Table 83

Estimated production by Country by Company-2019(US\$ Million)

Country	Company	2019Production US\$ Million
WESTERN EUROPE		
Austria	Siemens Others	87 31 56
Belgium		
Denmark		
Finland		
France		
Germany		
Greece		

Ireland		
Italy		
Netherlands		
Norway		
Portugal		
Spain		
Sweden		
Switzerland		
United Kingdom		

EASTERN EUROPE		
Bulgaria		
Croatia		
Czech Republic		
Hungary		
Poland		
Romania		
Serbia		
Slovakia		
Slovenia Others		

FORMER USSR		
Belarus		
Estonia		
Russia		
Ukraine		

AFRICA		
Egypt		
Morocco		
Tunisia		
South Africa		

MIDDLE EAST		
Iran		
Israel		
Saudi Arabia		
Turkey		
United Arab Emirates		
India		
Pakistan		

FAR EAST		
China		
Indonesia		
Japan		
Korea, North		

Korea, South		
Malaysia		
Philippines		
Taiwan		
Thailand		

SOUTH AMERICA		
Argentina		
Brazil		
Chile		
Colombia		
Peru		
NORTH AMERICA		
Canada		
Mexico		
USA		

AUSTRALASIA		
Australia		
New Zealand		
World		

Source: Goulden Reports Estimates

9. COUNTRY PROFILES BY REGION

9.1 Western Europe

Table 84

W Europe – Country by Country Profiles

Country	Country Area (Sq.Km)	Population (Thousands) 2019	GDP (US\$ Millions) 2019	GDP per Capita (US\$) 2019	Load (GWh) 2017	Average Load (kWh/Capita) 2017	Installed Capacity MW 2017	Transmission cctkm 2018	Distribution cctkm 2018	Low Voltage cctkm 2018
Austria	83,859	8,621	374,261	43,414	64,872	7,525	24,024	13,913	76,178	153,649
Belgium	30,519	11,209	454,288	40,529	81,330	7,256	20,919	7,612	87,327	113,366
Cyprus	9,251	847	19,330	22,822	3,929	4,639	1,699	1,066	3,480	10,260
Denmark	43,094	5,660	295,091	52,139	32,260	5,700	13,655	7,109	74,268	108,859
Finland	338,145	5,472	232,077	42,414	80,874	14,780	16,245	17,225	86,424	220,608
France	551,500	64,275	2,420,163	37,653	430,999	6,706	129,069	75,131	760,709	678,460
Germany	356,733	82,176	3,365,293	40,952	533,020	6,486	198,416	147,943	589,128	1,070,578
Greece	131,957	10,858	195,320	17,989	52,628	4,847	18,895	11,132	102,394	101,348
Iceland	103,000	333	16,718	50,277	17,497	52,543	2,766	1,967	8,640	6,540
Ireland	70,284	4,635	283,716	61,206	24,736	5,337	9,078	7,641	168,668	67,358

Source: Goulden Reports

W Europe – Country by Country Profiles - continued

Country	Country Area (Sq.Km)	Population (Thousands) 2019	GDP (US\$ Millions) 2019	GDP per Capita (US\$) 2019	Load (GWh) 2017	Average Load (kWh/Capita) 2017	Installed Capacity MW 2017	Transmission cctkm 2018	Distribution cctkm 2018	Low Voltage cctkm 2018
Italy	301,268	60,796	1,815,759	29,867	291,268	4,791	121,762	64,918	451,719	875,763
Luxembourg	2,586	563	57,825	102,717	6,157	10,936	2,022	98	2,816	5,006
Malta	316	429	9,752	22,713	2,012	4,690	629	342	2,401	2,607
Netherlands	40,844	16,937	750,696	44,323	107,704	6,359	31,758	11,110	116,696	148,161
Norway	323,877	5,205	388,315	74,598	116,302	22,344	33,664	21,014	104,729	88,226
Portugal	91,982	10,411	199,032	19,117	46,042	4,422	19,125	6,732	112,897	138,906
Spain	505,992	46,423	1,199,715	25,843	234,498	5,051	106,192	55,881	210,849	394,131
Sweden	449,964	9,851	493,042	50,050	127,201	12,912	38,699	35,560	173,712	261,367
Switzerland	41,284	8,238	664,005	80,603	57,721	7,007	19,291	9,978	140,095	130,081
United Kingdom	244,100	65,110	2,858,482	43,902	309,406	4,752	96,445	40,918	440,299	407,910
W Europe	3,720,555	418,049	16,092,880	38,495	2,620,455	6,268	904,353	537,290	3,713,430	4,983,182

Source: Goulden Reports

9.2 Eastern Europe

Table 85

E Europe – Country by Country Profiles

9.3 Former Soviet Union

Table 86

FSU – Country by Country Profiles

9.4 North Africa

Table 87

N. Africa – Country by Country Profiles

9.5 West Africa

Table 88

W. Africa – Country by Country Profiles

9.6 Central Africa

Table 89

Central Africa – Country by Country Profiles

9.7 East Africa

Table 90

East Africa – Country by Country Profiles

9.8 South Africa

Table 91

South Africa – Country by Country Profiles

9.9 Middle East

Table 92

Middle East – Country by Country Profiles

9.10 Indian Subcontinent

Table 93

Indian Subcon. – Country by Country Profiles

9.11 Asia

Table 94

Asia – Country by Country Profiles

9.12 South America

Table 95

South America – Country by Country Profiles

9.13 Central America & Caribbean

Table 96

C. America & Caribb. – Country by Country Profiles

9.14 North America

Table 97

North America – Country by Country Profiles

9.15 Australasia

Table 98

Australasia – Country by Country Profiles

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