

**The World Markets  
and  
Manufacturers of High Voltage  
Switchgear  
2022 - 2032**

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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, 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 2012–2021 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 2022 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 2007-2021.
- Market values for the period 2023 to 2032 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.



