Switchgear Market by Voltage (<1 kV, 1 to 52 kV, and >52 kV), by End-user (Transmission & Distribution Utilities, Manufacturing & Process Industries, and Commercial & Residential Infrastructure), and by Region - Global Trends & Forecast to 2021

Description: Switchgear market is expected to reach USD 144.41 billion by 2021, at a CAGR of 10.07% during the forecast period. Switchgear is an integral part of the electric power system. The power sector offers a promising future, with growing demand for electricity following increasing urbanization in the developing nations. Switchgear forms a crucial part in the sector across various segments including power generation, transmission & distribution, and equipment protection.

Transmission & Distribution Utilities: The fastest growing end-user segment in the global switchgear market. The market is projected to be promising for utilities owing to upgrades in transmission & distribution infrastructure in developed regions. Manufacturing & process industries segment is the second most growing application for switchgears. Meanwhile, commercial & residential infrastructure and other applications, which include transportation and power generation, have a considerable combined share in the market.

Developed regions such as North America and Europe are currently focusing on smart grid technology and upgrade of their current power infrastructure for better, reliable, and efficient networks. Smart technology will integrate modern communication technologies and renewable energy sources (wind, solar, others) into future power grids to supply more efficient, reliable, and safe power. This makes transmission & distribution utilities the fastest growing end-user segment in the global switchgear market.

Asia-Pacific: The fastest growing region in the global switchgear market. Developing economies of Asia-Pacific is estimated to grow at the highest rate, due to a large number of transmission & distribution line upgrades and developments in China, India, and the ASEAN countries. The Asia-Pacific region would continue to dominate the market during the forecast period, due to strong smart grid initiatives, high investments in transmission & distribution infrastructure development, energy efficiency measures, and renewable projects. Governments of countries in the region have taken various steps for renewable energy programs, driving the demand for switchgears.

Breakdown of Primaries: In-depth interviews have been conducted with various key industry participants, subject matter experts, corporate-level executives of key market players, and industry consultants among other experts to obtain & verify critical qualitative and quantitative information as well as assess future market prospects. Distribution of primary interviews is as follows:

- By Company Type: Tier 1 - 20%, Tier 2-45%, and Tier 3-35%
- By Designation: Corporate-Level-25%, Director Level-35%, and Others*-40%
- By Region: Americas-45%, Europe, Middle East & Africa-30%, Asia-Pacific-25%

Note: *Others include sales managers, marketing managers, and product managers.

The tier of the companies has been defined on the basis of their total revenue, as of 2015: Tier 1 = >USD 10 billion, Tier 2 = USD 1 billion to USD 10 billion, and Tier 3 = 52 kV. It analyses historical trends and also forecast for 2021, assisting in strategic decision making.

3. It presents competitive landscape of the switchgear market by analyzing recent market developments such as contracts & agreements, expansions, mergers & acquisitions, and new product launches from the key global market players. It helps to understand the competition strategies and plan respective initiatives.

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