



IHS Markit™

Switchgear Research Package

Advance your competitive position by
leveraging IHS Markit's critical insight on the
switchgear market

This new multi-database research package provides a unique analysis of the markets for switchgear products. Building on previous successful reports on these markets, this research package offers unparalleled coverage of existing and emerging trends, presenting detailed insight for multiple geographic regions and vertical markets, enabling you to make better business decisions and maximize growth opportunities. Each database provides an in-depth view into market sizing, market shares and forecasts.

Databases offered for individual or joint purchase:

- Low Voltage Soft Starters
- Medium Voltage Soft Starters
- Low Voltage Motor Control Centres
- Medium Voltage Motor Control Centres
- Hydraulic-Magnetic Circuit Breakers
- Air Circuit Breakers
- Molded Case Circuit Breakers
- Miniature Circuit Breakers
- Residual Current Devices
- Contactors
- Overload Protection Devices
- Transfer Switches
- Industrial Pushbuttons

BENEFITS	TIMELINE FOR DELIVERY
<ul style="list-style-type: none"> • Comprehensive market statistics by product and country • Competitive market shares • In-depth analysis of switchgear products • A thorough examination of product functionality and application • Insight on the impact of product developments, market pressures, and economic climate • In depth application and regional data 	<p>July 2015: Soft Starters, MCCs</p> <p>November 2016: MCBs, RCDs</p> <p>February 2017: Contactors, Overload Protection Devices</p> <p>March 2017: ACBs, MCCBs</p> <p>Deliverables for each database include: Excel based data sets, PDF trends analysis and access to analyst.</p>

MARKET SEGMENTATIONS

Low Voltage Soft Starters Database

EMEA

France	Central & Eastern Europe
Germany	Russian Fed. & CIS
Italy	Africa
United Kingdom & Ireland	Middle East
Rest of Western Europe	

AMERICAS

Brazil
 Canada
 Mexico
 United States
 Rest of Latin America

APAC

China
 India
 Japan
 Oceania
 Rest of Asia

INDUSTRY SECTOR

Discrete

Commercial HVACR
 Marine
 Pulp & Paper
 Other Discrete Industries

Other Industries

Infrastructure
 Other Sectors

Process

Cement, Glass, & Ceramics
 Chemicals
 Food & Beverage
 Metals & Mining
 Oil & Gas - Extraction
 Oil & Gas - Manufacture & Transport
 Power Generation
 Water & Wastewater
 Other Process Industries

INTELLIGENCE

Fieldbus
 Ethernet
 Wireless
 Without communication
 functionality

VOLTAGE

<380V
 380V - 550V
 551V - 690V
 691V - 1kV

CURRENT

<40A	401A - 600A
40A - 100A	601A - 1000A
101A - 200A	1001A - 2000A
201A - 400A	2000A<

CLASSIFICATION

IEC
 NEMA

MARKET SEGMENTATIONS

Medium Voltage Soft Starters Database

EMEA

France	Central & Eastern Europe
Germany	Russian Fed. & CIS
Italy	Africa
United Kingdom & Ireland	Middle East
Rest of Western Europe	

AMERICAS

Brazil
Canada
Mexico
United States
Rest of Latin America

APAC

China
India
Japan
Oceania
Rest of Asia

INDUSTRY SECTOR

Discrete

Commercial HVACR
Marine
Pulp & Paper
Other Discrete Industries

Other Industries

Infrastructure
Other Sectors

Process

Cement, Glass, & Ceramics
Chemicals
Food & Beverage
Metals & Mining
Oil & Gas - Extraction
Oil & Gas - Manufacture & Transport
Power Generation
Water & Wastewater
Other Process Industries

INTELLIGENCE

Fieldbus
Ethernet
Wireless
Without communication
functionality

VOLTAGE

1kV – 2.5kV
2.51kV – 3.3kV
3.31kV – 5kV
5.1kV – 10kV
10.1kV – 12kV
12kV<

CURRENT

<200A
201A - 400A
401A - 600A
600A<

CLASSIFICATION

IEC
NEMA

MARKET SEGMENTATIONS

Low Voltage MCCs Database

EMEA

France	Central & Eastern Europe
Germany	Russian Fed. & CIS
Italy	Africa
United Kingdom & Ireland	Middle East
Rest of Western Europe	

AMERICAS

Brazil
Canada
Mexico
United States
Rest of Latin America

APAC

China
India
Japan
Oceania
Rest of Asia

INDUSTRY SECTOR

Discrete

Commercial HVACR
Marine
Pulp & Paper
Other Discrete Industries

Other Industries

Infrastructure
Other Sectors

Process

Cement, Glass, & Ceramics
Chemicals
Food & Beverage
Metals & Mining
Oil & Gas - Extraction
Oil & Gas - Manufacture & Transport
Power Generation
Water & Wastewater
Other Process Industries

INTELLIGENCE

Fieldbus
Ethernet
Wireless
Without communication
functionality

VOLTAGE

<380V
380V - 550V
551V - 690V
691V - 1kV

CURRENT

<40A	401A - 600A
40A - 100A	601A - 1000A
101A - 200A	1001A - 2000A
201A - 400A	2000A<

CLASSIFICATION

IEC
NEMA

MARKET SEGMENTATIONS

Medium Voltage MCCs Database

EMEA

France	Central & Eastern Europe
Germany	Russian Fed. & CIS
Italy	Africa
United Kingdom & Ireland	Middle East
Rest of Western Europe	

AMERICAS

Brazil
 Canada
 Mexico
 United States
 Rest of Latin America

APAC

China
 India
 Japan
 Oceania
 Rest of Asia

INDUSTRY SECTOR

Discrete

Commercial HVACR
 Marine
 Pulp & Paper
 Other Discrete Industries

Other Industries

Infrastructure
 Other Sectors

Process

Cement, Glass, & Ceramics
 Chemicals
 Food & Beverage
 Metals & Mining
 Oil & Gas - Extraction
 Oil & Gas - Manufacture & Transport
 Power Generation
 Water & Wastewater
 Other Process Industries

INTELLIGENCE

Fieldbus
 Ethernet
 Wireless
 Without communication
 functionality

VOLTAGE

1kV – 2.5kV
 2.51kV – 3.3kV
 3.31kV – 5kV
 5.1kV – 10kV
 10.1kV – 12kV
 12kV<

CURRENT

<200A
 201A - 400A
 401A - 600A
 600A<

CLASSIFICATION

IEC
 NEMA

MARKET SEGMENTATIONS

Hydraulic-Magnetic Circuit Breakers Database

EMEA

Africa	Middle East
Austria & Switzerland	Nordics
Benelux	Russia, Ukraine, and CIS
France	Spain & Portugal
Germany	UK & Ireland
Italy	Rest of EMEA

AMERICAS

Brazil
 Canada
 Mexico
 United States
 Rest of Latin America

APAC

China
 India
 Japan
 Oceania
 Rest of Asia

INDUSTRY SECTOR

Defense
 Industrial Automation
 IT/Datacentre
 Medical
 PV/Alternative Energy
 Rail
 Telecom
 Other

PRODUCT TYPE

Hydraulic-magnetic circuit breakers
 Hydraulic-magnetic solutions

MOUNTING TYPE

DIN Rail
 Front screw
 Rear screw
 Threadneck panel
 Snap-in

NUMBER OF POLES

1-3
 4-6

FRAME SIZE

Small squared
 Long rectangular
 Standard CB format
 Large CB format
 Custom design

CURRENT TYPE

DC
 AC 50/60Hz
 AC 400Hz

RATED CURRENT

100A or less
 Greater than 100A

MARKET SEGMENTATIONS

Air Circuit Breakers (ACBs) Database

EMEA

Austria & Switzerland	Central & Eastern Europe
Benelux	Nordic Countries
France	Russian Fed. & CIS
Germany	Poland
Italy	Spain & Portugal
Turkey	Middle East & Africa
UK & Ireland	

AMERICAS

Brazil
 Canada
 Mexico
 United States
 Rest of Latin America

APAC

China
 India
 Japan
 Oceania
 South Korea
 Taiwan
 Rest of Asia

INDUSTRY SECTOR

Residential
 Non-Residential Structure
 Non-Residential Infrastructure
 Others

SALES CHANNEL

Direct to OEM/end user
 Direct to panel builder
 Direct to system integrator/EPC
 Via Distribution

BREAKING CAPACITY

≤ 25 kA
 > 25kA, ≤ 65 kA
 > 65kA, ≤ 100 kA
 > 100 kA

NOMINAL CURRENT RANGE

0-63A
 63-125A
 126-250A
 251-630A
 631-1000A
 1000A+

MARKET SEGMENTATIONS

Molded Case Circuit Breakers (MCCBs) Database

EMEA

Austria & Switzerland
Benelux
France
Germany
Italy
Turkey
UK & Ireland

Central & Eastern Europe
Nordic Countries
Russian Fed. & CIS
Poland
Spain & Portugal
Middle East & Africa

AMERICAS

Brazil
Canada
Mexico
United States
Rest of Latin America

APAC

China
India
Japan
Oceania
South Korea
Taiwan
Rest of Asia

INDUSTRY SECTOR

Residential
Non-Residential Structure
Non-Residential Infrastructure
Others

SALES CHANNEL

Direct to OEM/end user
Direct to panel builder
Direct to system integrator/EPC
Via Distribution

BREAKING CAPACITY

≤ 25 kA
> 25kA, ≤ 65 kA
> 65kA, ≤ 100 kA
> 100 kA

NOMINAL CURRENT RANGE

0-63A
63-125A
126-250A
251-630A
631-1000A
1000A+

MARKET SEGMENTATIONS

Miniature Circuit Breakers (MCBs) Database

EMEA

Austria & Switzerland	Central & Eastern Europe
Benelux	Nordic Countries
France	Russian Fed. & CIS
Germany	Poland
Italy	Spain & Portugal
Turkey	Middle East & Africa
UK & Ireland	

AMERICAS

Brazil
 Canada
 Mexico
 United States
 Rest of Latin America

APAC

China
 India
 Japan
 Oceania
 South Korea
 Taiwan
 Rest of Asia

INDUSTRY SECTOR

Residential
 Non-Residential Structure
 Non-Residential Infrastructure
 Others

SALES CHANNEL

Direct to OEM/end user
 Direct to panel builder
 Direct to system integrator/EPC
 Via Distribution

MCB TYPE

Primary
 Secondary

NOMINAL CURRENT RATING

<50A
 50-125A

MARKET SEGMENTATIONS

Residual Current Devices (RCDs) Database

EMEA

Austria & Switzerland	Central & Eastern Europe
Benelux	Nordic Countries
France	Russian Fed. & CIS
Germany	Poland
Italy	Spain & Portugal
Turkey	Middle East & Africa
UK & Ireland	

AMERICAS

Brazil
 Canada
 Mexico
 United States
 Rest of Latin America

APAC

China
 India
 Japan
 Oceania
 South Korea
 Taiwan
 Rest of Asia

INDUSTRY SECTOR

Residential
 Non-Residential Structure
 Non-Residential Infrastructure
 Others

SALES CHANNEL

Direct to OEM/end user
 Direct to panel builder
 Direct to system integrator/EPC
 Via Distribution

PRODUCT TYPE

GF Protector/Relays – Americas only
 GFCI– Americas only
 RCCB
 RCBO

MARKET SEGMENTATIONS

Contactors Database

EMEA

Austria & Switzerland
Benelux
France
Germany
Italy
Turkey
UK & Ireland

Central & Eastern Europe
Nordic Countries
Russian Fed. & CIS
Poland
Spain & Portugal
Middle East & Africa

AMERICAS

Brazil
Canada
Mexico
United States
Rest of Latin America

APAC

China
India
Japan
Oceania
South Korea
Taiwan
Rest of Asia

PRODUCT TYPE

General purpose AC
General purpose DC
Definite purpose AC
AC/DC common coil

CURRENT RATING

>9A
9A to 38A
40A to 65A
80A to 100A
100A to 500A
>500A

ACTUATION

Electromechanical
Solid State

BREAKING TECH.

Air
Vacuum

GENERAL PURPOSE CONTACTORS IN MOTOR VERTICALS

Discrete

Automotive
Commercial HVAC
Conveyors
Cranes & Hoists
Elevators & Escalators
Food, Beverage, &
Tobacco

Machine Tools
Marine
Mining
Packaging & Labelling
Printing
Robotics
Rubber & Plastics

Semiconductor Equipment
Textiles
Woodworking
Other
Other Industry sectors
Other process industries
Other industry sectors

GENERAL PURPOSE CONTACTORS IN POWER SWITCHING VERTICALS

Capacitors banks
EV charging stations

Generators
PV inverters

UPS
Wind turbines

Other (panel)

CUSTOMER REQUIREMENTS

Contactor sold with O/L
Contactor sold without O/L

GENERAL PURPOSE APPLICATIONS

Motors – Control
Motors – Bypass
Motors – Isolation
Power Switching
Other loads

GENERAL PURPOSE IN OTHER LOADS

Lighting
Oven
Other

DEFINITE PURPOSE APPLICATIONS

HVACR
Lighting
Other

MARKET SEGMENTATIONS

Overload Protection Devices Database

EMEA

Austria & Switzerland
Benelux
France
Germany
Italy
Turkey
UK & Ireland

Central & Eastern Europe
Nordic Countries
Russian Fed. & CIS
Poland
Spain & Portugal
Middle East & Africa

AMERICAS

Brazil
Canada
Mexico
United States
Rest of Latin America

APAC

China
India
Japan
Oceania
South Korea
Taiwan
Rest of Asia

CURRENT RATING

>9A	80A to 100A
9A to 38A	100A to 500A
40A to 65A	>500A

CUSTOMER REQUIREMENTS

Contactor sold with O/L
Contactor sold without O/L

BREAKING TECHNOLOGY

Air Vacuum

OVERLOAD TECHNOLOGY

Melted Alloy
Bi-Metal Technology
Solid State w/ comms
Solid State w/o comms

GENERAL PURPOSE CONTACTORS IN MOTOR VERTICALS

Discrete
Automotive
Commercial HVAC
Conveyors
Cranes & Hoists
Elevators & Escalators
Food, Beverage, and
Tobacco

Machine Tools
Marine
Mining
Packaging & Labelling
Printing
Robotics
Rubber & Plastics

Semiconductor
Equipment
Textiles
Woodworking
Other
Other Industry sectors
Other process industries
Other industry sectors

SHORT CIRCUIT PROTECTION

Overload Relay only
Overload relay with
short-circuit Protection

GENERAL PURPOSE CONTACTORS IN POWER SWITCHING VERTICALS

Capacitors
banks
EV charging stations
Generators

PV inverters
UPS
Wind turbines
Other (panel)

MARKET SEGMENTATIONS

Transfer Switches Database

EMEA

Europe
Russia & FSU
Africa
Middle East
Rest of EMEA

AMERICAS

Brazil
Canada
United States
Rest of Latin America

APAC

China
India
Rest of Asia

INDUSTRY SECTOR

Medical & Healthcare
Data Centers
Utility Installations
Financial Institutions
Airports
Governmental Institutions
Agriculture
Residential Apartments
Agriculture
Telecom & IT

PRODUCT TYPE

ATS (Contactor)
ATS (Circuit Breaker)
MTS

TRANSFER METHOD TYPE

Open
Closed
Delayed
Soft-Load

MARKET SEGMENTATIONS

Industrial Pushbuttons Database

EMEA

Austria & Switzerland	Turkey
Benelux	Nordics
France	Poland
Germany	Russia and CIS
Italy	Spain & Portugal
Middle East & Africa	UK & Ireland
	Rest of EMEA

AMERICAS

Brazil
 Canada
 Mexico & Central America
 United States
 Rest of Latin America

APAC

China & Hong Kong
 Indian Sub-continent
 Japan
 Oceania
 Taiwan
 Rest of Asia

SALES CHANNEL

Direct to OEM
 Panel Builders
 System Integrators
 Via Distribution

E-STOP

E-Stop
 Other

ASSEMBLY

Compact/Monoblock
 Modular

TRAVEL DISTANCE

<3mm Short
 >3mm Normal

SIZE

16mm
 22mm
 30mm
 Other

FRONT RING MATERIAL

Metal
 Non-Metal

OPERATING ENVIRONMENT

Hazardous
 Non-Hazardous

CONNECTIVITY

Networked
 Non-networked

LEAD ANALYSTS

John Morse

John Morse is a senior analyst with the company's Manufacturing Technology group. John specializes in industrial communications and machine vision. As such, he has been responsible for a number of research projects, has had numerous related articles published, and has been, and remains, an active conference presenter. John brings more than 25 years' experience to his role. John holds a degree in physics and electronics, as well as post graduate qualifications in business management and marketing. He is based in the company's headquarters in Wellingborough, UK.

Brian Arbuckle

Brian is a senior market analyst specializing in manufacturing technology. Brian has an engineering degree from the University of Warwick and an MBA. His career has spanned marketing management roles in industry for electronic and mechanical components, mobile communications networks together with consultancy roles across many industry sectors.

Susanne Cumberland

Susie joined IHS Markit in 2016 and is a research data analyst in the Manufacturing Technology group. She has a degree in physics with astrophysics from Nottingham Trent University. Susie is currently based in Wellingborough, UK, and covers research in discrete machine-safety and switchgears.

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