

SF₆-Free MV GIS Market Dynamics Amid F-Gas Regulation in Europe

Due to the high share of Europe in the global annual GIS units market, regulations impacting SF₆, the most potent F-gas, significantly impact the global GIS market.

European OEMs are leading from the front by introducing SF₆-free MV GIS products in the market.

F-gas Regulations

From April 2024, the revised F-gas Regulation (EU) 2024/573 will come into force, reaffirming a steeper phase-out of F-gases from the remaining applications, building upon years of discussion and feedback on the amendments to F-gas Regulation (EU) 517/2014 put forward in 2022.

MV

Voltage
Deadline >

≤24kV
January 01, 2026

>24kV to ≤52kV
January 01, 2030

Effective after the deadline, the use of any F-gas in new MV equipment will be prohibited, as technically suitable alternatives with a GWP <1 are now available.

HV

>52kV to ≤145kV
January 01, 2028

>145kV
January 01, 2032

The use of SF₆ or other F-gas mixtures in new HV switchgear with a GWP > 1 will only be permitted if no OEM bids with suitable equipment of GWP < 1.

Starting from 2035, the use of new SF₆ in switchgear will be strictly prohibited, even for maintenance, and only reclaimed/recycled gas will be permissible. However, the regulations are lenient on brownfield projects in case no technically suitable alternatives are available.

SF₆-free MV GIS Market Outlook

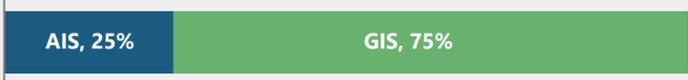
MV GIS Market Dynamics in Europe

- F-gas Regulation prohibiting the sale of SF₆-GIS in Europe will have significant reverberations regionally and globally.
- Within Europe, GIS outsells AIS with a ratio of 3:1.
- Moreover, Europe accounts for 45% of annual sales of MV GIS units globally.
- The major drivers of GIS, in Europe, are its use in the renewables and utility sectors.

MV GIS Market Share



MV Switchgear Technology Share



MV GIS Market Dynamics in Europe

- For voltages <42kV, major OEMs have introduced SF₆-free GIS products in their portfolio.

OEM
Product >

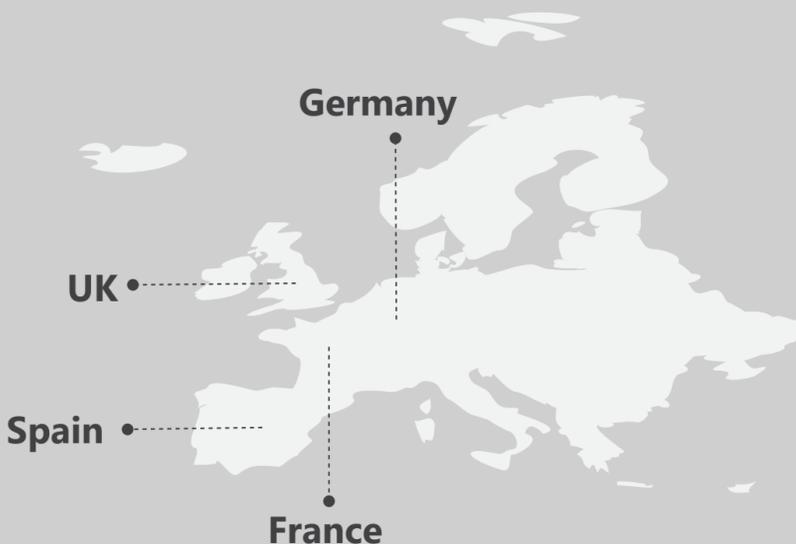
ABB
AirPlus

Schneider Electric
AirSeT

SIEMENS
Blue-GIS

Major Economies Driving the SF₆-free MV GIS Market in Europe

- Western European economies will drive the sale of SF₆-free MV GIS.



SF₆ Alternatives for MV GIS

- Natural-origin-gasses: N₂, O₂, CO₂