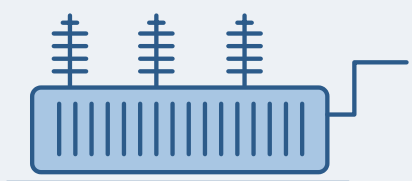
SAUDI TRADE · 2023–2025 / INDEPENDENT RESEARCH

The changing sources of Saudi power transformers

Saudi imports of large liquid-dielectric transformers exceeded $900m in 2025. Procurement teams also faced a sharp change in where those imports came from.

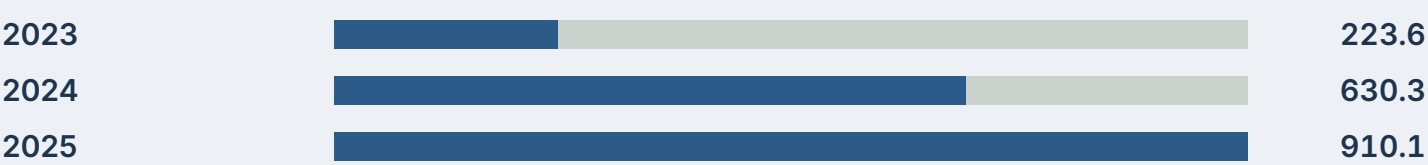
$910m

Saudi import value in 2025 for liquid-dielectric transformers above 10 MVA



Large-transformer imports rose fourfold in two years

Saudi gross imports, USD million



Saudi-reported imports under HS 850423, rounded to $0.1m. Ratings above 10 MVA are grouped in one customs line.

WITS / UN Comtrade · 2023 WITS / UN Comtrade · 2024 WITS / UN Comtrade · 2025

EXHIBIT 02 · GRID EQUIPMENT

Reported import origins shifted toward China

Origin	2024 · $m	2025 · $m	2025 share
China	220.6	660.0	72.5%
South Korea	230.0	86.3	9.5%
Sweden	38.3	64.1	7.0%
Other origins	141.4	99.7	11.0%
All origins	630.3	910.1	100.0%

Other origins are the reported world total less the three named origins. Shares use unrounded values.

One country explains the annual increase

China’s reported value rose from $220.6m in 2024 to $660.0m in 2025. The $439.4m increase exceeded the $279.8m rise across all origins because other origins together fell by $159.6m.

The supplier mix changed within the same rating band

South Korea represented 36.5% of 2024 import value and 9.5% in 2025. Sweden rose in dollars, from $38.3m to $64.1m. A shortlist based on one year of aggregate share can miss factories that delivered major orders in an earlier year.

REGIONAL DEMAND SCREEN

Saudi purchases dominate this five-market comparison

An import record can correspond to the delivery of a unit ordered years earlier. For a factory evaluating the Gulf, the order book must therefore be reconstructed from substations, tenders and energisation schedules.

Gross imports by reporting market

2024 · USD million · HS 850423



The same annual world-partner query returned five Gulf reporters. It returned no UAE observation for this series. The five values therefore cover a partial region. Cross-border re-exports and domestic production prevent a direct conversion from imports to end-user demand.

The next market to investigate

Compare Qatar and Oman on voltage class, award schedule and access to service crews. A single large station can shift the annual ranking. Begin with announced station requirements, then match the rating of each transformer lot to the proposed factory.

UN Comtrade · Saudi Arabia and Oman UN Comtrade · Bahrain, Kuwait and Qatar

BUYERS, SUPPLIERS AND QUALIFICATION

Which factories can compete for a specific rating?

Electrical Industries Company describes a Dammam capability of up to 100 MVA at 145 kV for Saudi Power Transformers Company. That places a domestic manufacturing route inside part of this customs category. It says little about available production slots or qualification for a specific tender.

Route	What the buyer compares	Evidence to request
Domestic factory	Build range, test capacity and local response	Nameplate family, test-bay limits and a factory slot tied to the required delivery.
Imported factory with Saudi support	Delivered schedule and warranty execution	Factory and freight milestones, installation scope and a signed service arrangement.
Utility or EPC package	Approval for the material, plant and purchaser	Tender reference, applicable specification revision and confirmation of the specific factory's status.

A useful qualification boundary

SEC publishes a vendor-registration route and a separate manufacturer list for distribution materials. An entry for a distribution transformer does not establish approval for a high-voltage power transformer. IEC 60076-1 gives general scope. The tender determines applicable parts, tests and performance guarantees.

Electrical Industries Co. · SPTC factory capability SEC · vendor registration SEC · January 2026 distribution-material list IEC · scope of 60076-1

COMMERCIAL SENSITIVITY / ILLUSTRATIVE CASE

How much extra is a lower-loss transformer worth?

Consider two otherwise equivalent bids. The second costs SAR 300,000 more. Its guaranteed no-load loss is 8 kW lower and its rated load loss is 40 kW lower. Loading determines how much of the second saving materializes.

RMS load / rating	Average kW saved	SAR saved / year	12-year PV · SAR
40%	14.4	25,229	190,126
60%	22.4	39,245	295,752
80%	33.6	58,867	443,628

Assumptions: continuous energisation, constant real energy cost of SAR 0.20/kWh, 12 years and an 8% real discount rate. Average kW saved = 8 + 40 × (RMS load fraction)². Equal reliability and maintenance.

60.7% RMS load

At this loading the discounted energy saving equals the premium. A station operating nearer 40% would favor the cheaper bid on energy economics. At 80%, the lower-loss unit clears the price premium. Check actual load-duration data and the measurement tolerance in the guarantee.

MARKET ENTRY / SERVICE ECONOMICS

When a Saudi service base pays its way

A service operation can be tested before a commitment to manufacture. The commercial question is how many completed jobs cover the local team's fixed costs. The answer depends on actual contract coverage, call-out distance and the split between warranty work and billable work.

Evidence	Who can provide it	How the decision changes
Serviceable installed base	Plant operators and OEM service managers	Count eligible units by class, age and location. Remove assets already tied to an exclusive service contract.
Billable work per year	Maintenance buyers and approved service partners	Separate periodic tests, planned outages and emergency repairs. Confirm which work the team can invoice.
Resources per intervention	Field engineer and logistics partner	Price mobilization, specialist tooling, travel, spares and subcontractor time before setting a fee.

Entry economics

At illustrative annual overhead of SAR 1.2m and SAR 60,000 contribution per job, 20 jobs cover fixed cost. At SAR 40,000 per job, 30 are needed. Both thresholds exclude startup investment. A signed maintenance scope and a credible job count provide more evidence than annual import growth.

DECISION AND DILIGENCE

A sourcing decision should follow the energisation date

Work backwards from the required in-service date. The attractive supplier is the one that can deliver the specified unit, demonstrate performance and stand behind it after commissioning.

01 **Engineering**

Issue one data sheet with rating, taps, losses, test scope and physical constraints. Record deviations against each bid.

02 **Procurement**

Secure dated production and test slots. Separate ex-works price, freight, installation and spares. Verify approval against the named site and specification.

03 **Commercial evaluation**

Apply the same loading history to all guarantees. Price loss differences, then assess schedule exposure against the project’s actual late-delivery provisions.

What would change the conclusion

An earlier firm factory slot can justify a higher price where a delay would hold up station energisation. Price that exposure using the project schedule and contract. Country market share alone cannot answer the award question.

OPERATING IMPLICATIONS

Look one level below the origin

For a new substation, an equipment buyer needs the available factory slot, rating, voltage ratio, losses, test plan and delivery window. Group quotations by comparable ratings and contractual scope. Then assess whether alternative factories can deliver against the same energisation date.

DECISION

Map scheduled deliveries against substation energisation dates, then request lead times and test slots from eligible plants across at least two sourcing routes.

Method

Compare Saudi reporter records across three calendar years at HS six-digit level. Use the world series once per year and individual origins only to decompose it.

Scope of the evidence

Import declarations capture cross-border deliveries. Domestic output, installed capacity, plant identity and the timing of contract awards require separate evidence.

Source documents

WITS / UN Comtrade · 2023 WITS / UN Comtrade · 2024 WITS / UN Comtrade · 2025
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