SAUDI TRADE · 2023–2025 / INDEPENDENT RESEARCH

24 November 2026

Saudi medium-voltage switchgear: imports, origins and the local manufacturing route

Panel imports climbed as breaker imports fell.

Saudi buyers sourced a growing value of assembled panels from abroad. A local builder can compete where its qualified design and delivery slot fit the substation.

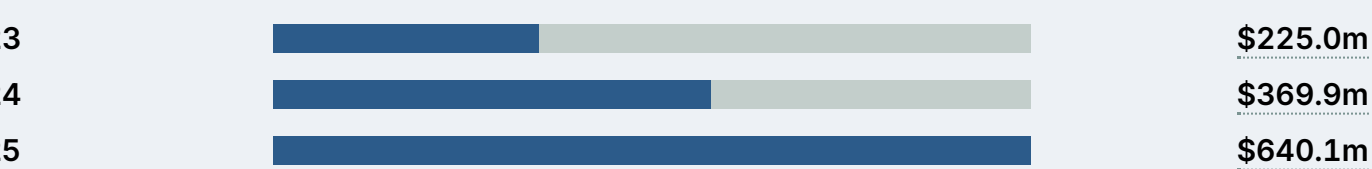
$640.1m

Saudi imports of boards and panels above 1 kV in 2025. The customs heading also includes higher-voltage equipment.



Imports of boards and panels above 1 kV

HS 853720 · USD million



Source · UN Comtrade Plus · annual Saudi imports from the world

EXHIBIT 02 / MARKET AND ORIGINS

China supplied the largest share of imported panels in each year

Saudi imports of HS 853720 · leading partner and rank by value · USD million

Year	All origins	Leading origin	Value	Share
2023	225.0	China	123.2	54.7%
2024	369.9	China	153.6	41.5%
2025	640.1	China	380.1	59.4%

The order book moved towards China

China supplied 380.1 million dollars of panels in 2025. A buyer seeking another source should ask whether the alternative factory can build and test the same panel design. Country totals cannot answer that question.

Other components have different supply bases

South Korea led both breaker headings in 2025. Switzerland led isolating and make-and-break switches. A panel assembler therefore needs a separate supplier and continuity plan for each component family. The full comparison is on page 7.

Partner means declared customs origin. An OEM may operate plants in several countries.

2025 component origin records · 853521 · 853529 · 853530

REGIONAL DEMAND SCREEN / HS 853720

Oman’s panel imports rose in each reported year

Gross imports from the world · USD million · HS 853720

Reporting market	2023	2024	2025
Saudi Arabia	225.0	369.9	640.1
Oman	24.7	68.1	93.0
Qatar	91.9	104.2	not available
Kuwait	29.4	39.9	25.5
Bahrain	15.3	10.0	not available
UAE	196.4	not available	not available

“not available” means the annual primary-reporter query returned no observation for that market and code at retrieval. No mirror values or zeros have been substituted.

What to investigate next

Start with Omani and Saudi buyers that can identify the tender, voltage class and approved panel family. Ask whether the order covers a complete assembly or cubicles supplied under a framework. A regional trade total cannot identify the purchaser.

How to use the UAE comparison

The UAE has a 2023 observation. The later queries returned no UAE observation, so a latest-year GCC ranking would leave out part of the market.

BUYERS, SUPPLIERS AND QUALIFICATION

Qualify the assembled panel and the factory that will build it

Route	What the buyer compares	Evidence to request
Utility direct	Rated voltage, fault duty, service continuity and the utility's approved scope.	Material specification, single-line diagram, current factory and product approval, test-report references.
EPC / local panel builder	Enclosure, busbar and breaker combination, integration responsibility, factory slot and site support.	OEM authorisation where applicable, assembly drawings, component list, design-test coverage and factory acceptance plan.
Imported OEM package	Exact model and manufacturing site, interface with local protection, landed delivery and warranty.	Model-specific test reports, approved deviations, shipping programme and local service commitments.

STANDARDS AND SAUDI APPROVAL

IEC 62271-200 covers AC metal-enclosed assemblies above 1 kV through 52 kV. IEC 62271-100 addresses AC circuit-breakers. Match the ordered configuration and tender edition to the submitted reports.

Where Saudi Energy enters the process

The manufacturer first obtains its approved supplier number through commercial and financial registration. It then applies through the technical qualification portal for the relevant product group.

Sources · IEC 62271-200 · IEC 62271-100 · Saudi Energy manufacturer qualification · Saudi Energy supplier registration

COMMERCIAL SENSITIVITY / ILLUSTRATIVE CASE

Four weeks of avoided delay cover the local premium

Hypothetical quotations and project costs. Both offers meet the same approved design, delivered scope and warranty.

Assumption	Imported OEM	Local assembler
Delivered price	SAR 2,000,000	SAR 2,240,000
Net delay to energisation after available float	8 weeks	2 weeks
Incremental project cost per late week	SAR 60,000	SAR 60,000
Price plus delay cost	SAR 2,480,000	SAR 2,360,000

BREAK-EVEN

Break-even delay avoided = SAR 240,000 premium ÷ SAR 60,000 per week = 4 weeks.

What the buyer saves

In this case the assembler avoids 6 critical weeks, worth SAR 360,000. After the premium, the project saves SAR 120,000. Count only the cost the project actually avoids.

Where the result reverses

If civil works leave only 2 weeks of avoidable delay, the time benefit falls to SAR 120,000. The imported offer then costs SAR 120,000 less overall.

DECISION AND DILIGENCE / SUPPLIER SHORTLIST

Issue one specification and compare the dates each supplier can commit to

01 Engineering | freeze the interfaces

Record the busbar rating, fault duty, protection scheme, cable entries and acceptance tests on a common compliance sheet. Mark every deviation that needs the owner’s approval.

02 Procurement | confirm the factory slot

Ask the factory to date drawing approval, long-lead components, witnessed tests and delivery to site. Obtain a named entity responsible for integration and warranty.

03 Commercial | price the critical path

Compare delivered prices, then add the cost of delay that remains after float. Shortlist the compliant bids with a credible delivery programme and a clear remedy for missed milestones.

WHAT WOULD CHANGE THE CONCLUSION

A change in fault duty, rejection of a test report, an earlier imported slot or slippage in civil works can change the award. Re-run the comparison when one changes.

OPERATING IMPLICATIONS / COMPONENT SOURCING

Source breakers and isolators separately from complete panels

Saudi imports · cell = USD million / year-on-year change. The 2023 change uses 2022.

HS code	2023	2024	2025
853720	225.0 / +38.7%	369.9 / +64.4%	640.1 / +73.0%
853521	85.1 / -0.8%	65.6 / -22.9%	45.0 / -31.4%
853529	241.7 / +24.9%	487.0 / +101.4%	321.5 / -34.0%
853530	221.6 / +45.2%	311.0 / +40.3%	151.3 / -51.3%

Three largest declared origins · share of total Saudi imports for each code and year.

HS code	Year	Origin and share
853720	2023	China 54.7% · Germany 11.7% · Spain 5.3%
853720	2024	China 41.5% · France 13.3% · Germany 11.6%
853720	2025	China 59.4% · Bulgaria 5.3% · Italy 5.1%
853521	2023	UAE 42.4% · Italy 17.2% · China 15.6%
853521	2024	South Korea 44.3% · Italy 26.5% · UAE 16.1%
853521	2025	South Korea 50.3% · China 12.4% · UAE 9.6%
853529	2023	South Korea 51.9% · UAE 35.7% · France 3.2%
853529	2024	South Korea 69.2% · UAE 22.2% · France 2.4%
853529	2025	South Korea 50.1% · UAE 26.8% · China 15.6%
853530	2023	Switzerland 54.1% · France 11.6% · Türkiye 9.5%
853530	2024	Switzerland 56.5% · China 13.6% · Bulgaria 8.7%
853530	2025	Switzerland 30.4% · China 29.1% · Bulgaria 21.7%

853521 covers breakers above 1 kV and below 72.5 kV. 853529 starts at 72.5 kV. 853530 covers isolating and make-and-break switches above 1 kV.

OPERATING IMPLICATIONS / RESEARCH NOTES

Award against the approved design and a credible delivery date

DECISION

Shortlist the factory and panel design that clear the owner's approval and deliver the lowest cost against the actual energisation date.

Method

We compared Saudi import values with each prior calendar year and ranked origins against the corresponding World total. The same annual World query underlies each regional cell. Values in the tables are rounded to USD million and shares to one decimal.

Scope of the evidence

HS 853720 includes equipped boards, panels and other bases above 1 kV. Customs records do not separate medium voltage, domestic output, brands, model approvals or embedded components. Summing imported panels and breakers does not measure purchases of finished panels.

Source documents

Sources are linked below. Open Source-list.txt in the PDF attachments for the full queries and retrieval dates.

Sources · UN Comtrade Plus · IEC 62271-200 · IEC 62271-100 · Saudi Energy manufacturer qualification · UN Comtrade HS 2022 headings