



Freedonia Focus Reports
US Collection

Electric Power Transmission & Distribution Equipment: United States

October 2019



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Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	5
Technological Trends	6
Environmental & Regulatory Factors	8
North America Regional Overview	10
3. Segmentation & Forecasts	12
Products	12
Switchgear & Switchboard Apparatus	13
Power Transformers	14
Distribution Transformers	14
Other Transformers	15
Markets	17
Electric Utilities	18
Industrial & Nonutility Generators	18
Commercial, Government, & Residential	19
4. Industry Structure	21
Industry Characteristics	21
Market Leaders	22
ABB	22
Eaton	23
Siemens	24
5. About This Report	25
Scope	25
Sources	25
Industry Codes	26
Freedonia Methodology	26
Resources	28

List of Tables & Figures

Figure 1 Key Trends in the US Electric Power T&D Equipment Market, 2018 – 2023	3
Figure 2 US Electric Power T&D Equipment Demand Trends, 2008 – 2018	4
Table 1 Key Indicators for US Electric Power T&D Equipment Demand, 2008 – 2023 (US\$ bil)	5
Figure 3 North America Electric Power T&D Equipment Demand by Country, 2018 (%)	10
Figure 4 US Electric Power T&D Equipment Demand by Product, 2008 – 2023 (US\$ mil)	12
Table 2 US Electric Power T&D Equipment Demand by Product, 2008 – 2023 (US\$ mil)	12
Figure 5 US Electric Power T&D Equipment Demand by Product, 2008 – 2023 (%)	16
Figure 6 US Electric Power T&D Equipment Demand by Market, 2008 – 2023 (US\$ mil)	17
Table 3 US Electric Power T&D Equipment Demand by Market, 2008 – 2023 (US\$ mil)	17
Figure 7 US Electric Power T&D Equipment Demand by Market, 2008 – 2023 (%)	20
Table 4 Selected Suppliers to the US Electric Power T&D Equipment Market	22
Table 5 NAICS & SIC Codes Related to Electric Power T&D Equipment	26

About This Report

Scope

This report forecasts to 2023 US electric power transmission and distribution equipment demand in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- switchgear and switchboard apparatus
- power transformers
- distribution transformers
- other transformers such as machine tool control, power regulating, and specialty types

Total demand is also segmented by market as follows:

- electric utilities
- industrial and nonutility generators
- commercial, government, and residential

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; the various segments are reported at five-year intervals for 2008, 2013, and 2018.

Excluded from the scope of this report are electronic transformers, electric meters, fluorescent lamp ballasts, pole and transmission line hardware, cable, and power generation equipment (e.g., generators and motors).

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Electric Power Transmission & Distribution Equipment: United States (FF45013) is based on [Global Electric Power Transmission & Distribution Equipment](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications

About This Report

- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | NAICS & SIC Codes Related to Electric Power T&D Equipment

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
334515	Instrument manufacturing for measuring and testing electricity and electrical signals	3612	Power, distribution, and specialty transformers
335311	Power, distribution, and specialty transformer manufacturing	3613	Switchgear and switchboard apparatus
335313	Switchgear and switchboard apparatus manufacturing	3625	Relays and industrial controls
335314	Relay and industrial control manufacturing	3644	Noncurrent-carrying wiring devices
335932	Noncurrent-carrying wiring device manufacturing	3825	Instruments to measure electricity

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis,

About This Report

end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Electric Power Transmission & Distribution Equipment

Freedonia Industry Studies

General Purpose LEDs & Other High-Efficiency Lighting Products in the US

General Purpose Lighting Fixtures in the US

Global Batteries

Global Electric Motors

Rechargeable (Secondary) Batteries

Single-Use (Primary) Batteries in the US

Smart Lighting in the US

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Agencies & Associations

California Public Utilities Commission

Edison Electric Institute

Federal Energy Regulatory Commission

International Organization for Standardization

National Electrical Manufacturers Association

United States Census Bureau

United States Energy Information Administration

United States International Trade Commission