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World Collection



World Electricity Transmission & Distribution Equipment

September 2013



Highlights

World Overview and Forecasts

Demand by Product | Demand by Market | Production Trends

Regional Trends and Forecasts

Regional Demand Overview | North America | Western Europe | Asia/Pacific
Other Regions

Industry Structure

Industry Composition | Industry Leaders | Additional Companies Cited

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ABOUT THIS REPORT

Scope & Method

This report forecasts total world demand in 2017 for electricity transmission and distribution (T&D) equipment by product, market, and major world region in US dollars at the manufacturers' level. Product segments include:

- switchgear and switchboard apparatus
- power transformers
- distribution transformers
- other transformers such as high intensity discharge (HID) lighting ballasts and machine tool control transformers.

Excluded from the scope of this report are electronic transformers, electric meters, fluorescent lamp ballasts, pole and transmission line hardware, and power generation equipment (eg, generators and motors). The terms “switchgear” and “switchboard apparatus” are used interchangeably throughout this report.

Reported markets encompass:

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

Major world regions include:

- North America
- Western Europe
- Asia/Pacific
- all other regions.

Demand by product segment is also forecast for each major world region.

To illustrate historical trends world, product, market, and regional demand are provided for 2007 and 2012. Further, regional demand is segmented by market for 2012.

Finally, world production is segmented by major world region and provided for 2007, 2012, and 2017.

Forecasts emanate from the identification and analysis of pertinent statistical relationships and other historical trends/events as well as their expected progression/impact over the forecast period. Changes in quantities between reported years of a given total or segment are typically provided in terms of five-year compound annual growth rates (CAGRs). For the sake of brevity, forecasts are generally stated in smoothed CAGR-based descriptions to the forecast year, such as “demand is projected to rise 3.2% annually through 2017.” The result of any particular year over that period,

however, may exhibit volatility and depart from a smoothed, long-term trend, as historical data typically illustrate.

Demand in US dollars reflects local-currency inflation from reported year to reported year, but rates of exchange between local currencies and the US dollar are held constant in all reported periods, that is, at an average-annual exchange rate calculated for the base year of 2012.

Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the [Table of Contents](#).

Sources

World Electricity Transmission & Distribution Equipment is based on [a comprehensive industry study](#) published by The Freedonia Group in September 2013. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- The Freedonia Group Consensus Forecasts dated June 2013
- the findings of other industry 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

The topic of this report is related to the following industry codes:

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
335311	Power, Distribution, and Specialty Transformer Mfg	3612	Power, Distribution, and Specialty Transformers
335313	Switchgear and Switchboard Apparatus Mfg	3613	Switchgear and Switchboard Apparatus

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