



World Electric Power Transmission & Distribution Equipment

Industry Study with Forecasts for **2013 & 2018**

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Newer versions of existing electric power equipment used with wind and solar energy, and with the oil and gas, mining, and heavy manufacturing industries, will see strong growth.

Global demand to rise 5.3% yearly through 2013

World demand for electric power transmission and distribution equipment is forecast to rise 5.3 percent per year through 2013 to \$129 billion. Although strong, gains will decelerate significantly in comparison to the growth experienced between 2003 and 2008, when market value was boosted by a high pricing environment. Newer versions of existing electric power equipment products used in conjunction with wind and solar energy, and in conjunction with the oil and gas, mining, and heavy manufacturing industries, will see strong growth as a result of the increasingly potent global environmental movement that aims to tax and curtail carbon heavy industries. These newer products will include high voltage direct current (HVDC) electricity transmission lines that are often more efficient than the typical alternating current power lines. The largest markets for electric power transmission and distribution equipment are the electric utilities and industrial sectors, the latter of which will register the strongest overall gains through 2013.

Asia/Pacific region to register strongest gains

The Asia/Pacific region is projected to register by far the strongest gains among all regions in electric power equipment demand through 2013. The region is home to more than 55 percent of the world's population, with a sizable portion of these people living in rural areas often

World Electric Power Equipment Demand, 2008

(\$99.5 billion)

Asia/Pacific
42%

North America
24%

Western Europe
15%

Other Regions
19%



devoid of electricity. Robust economic growth in developing countries such as China and India, combined with rapid urbanization and growth in fixed investment spending (especially in infrastructure such as roads and electricity generation), will work to boost demand for electric power equipment in the region. The developed Japanese market, however, will continue to register below average gains.

The North American and West European markets will both perform below the global average, with the latter particularly weak. Both regions have relatively large and mature markets for electric power equipment, with a sizable majority of their inhabitants already living in urban-

ized areas. Even rural inhabitants in North America and Western Europe typically have ready access to national electric grid supplies. In Western Europe, growth in electric power equipment demand will be further hampered by negligible gains in population levels through 2013. In the US, gains in wind power generation are expected to be spectacular through 2013, benefitting electric power equipment sales to that sector. In spite of having an abundant supply of wind and vast land area, wind power currently accounts for under two percent of total US electricity needs (as opposed to 20 percent in Denmark; over 10 percent in Ireland, Portugal and Spain; and 6 percent in Germany).

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Sample Text, Table & Chart

ASIA/PACIFIC

A continuing large-scale rural electrification program coupled with significant upgrading of the country's power transmission and distribution network will bode well for electric power equipment in India -- particularly for distribution transformers. In addition, investment and GDP growth in the country will be among the highest in the world, bolstering demand for electricity-consuming goods and buildings.

Demand for pole mounted transformers will register higher growth than demand in urban areas -- making distribution transformers close to residential areas a high-growth status products will also post strong growth. Circuit breakers and gas-insulated switchgear will also see strong growth.

Siemens opened a production facility for gas-insulated switchgear in Vadodra, India. The facility marked Siemens' entry into the Indian market for gas-insulated high voltage switchgear. Approximately 100 switchgear panels with a rated voltage of up to 145 kilovolts will be manufactured in the first year of production at this plant. By 2013, annual production is expected to reach 300 switchgear panels, with expanded manufacturing to include switchgear with a rated voltage of 245 kV. Siemens is also installing its third high voltage direct-current electricity transmission system in India, expected to be completed in 2011.

In March 2009, AREVA T&D India inaugurated eight new plants to meet India's growing demand for electric power equipment and services. These sites include a 350,000-square-meter plant in Vadodra, a 90,000-square-meter plant in Hosur and a 21,400-square-meter plant in Padappai. The total investment in these facilities was nearly \$220 million.

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TABLE VI-7
INDIA -- ELECTRIC POWER EQUIPMENT SUPPLY & DEMAND
 (million dollars)

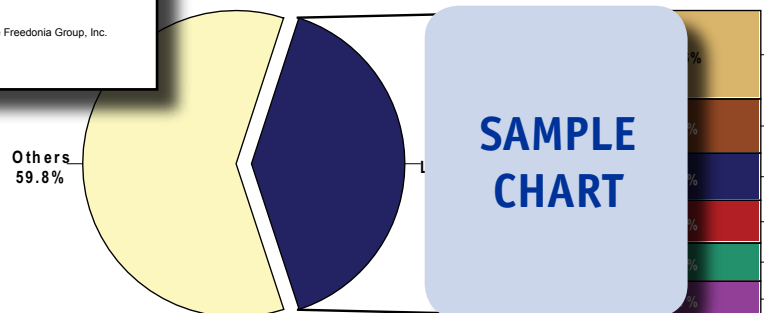
Item	1998	2003	2008	2013	2018
Population (millions)					8
GDP/capita					0
Gross Domestic Product (bil 2007\$)					5
Electric Power Generation (bil kWh)					0
Gross Fixed Investment (bil 2007\$)					0
\$ elec power equip/000 kWh					5
\$ elec power equip/000\$ invest					8
Electric Power Equipment Demand					0
net exports					0
Electric Power Equipment Shipments					50

SAMPLE TABLE

SAMPLE TEXT

CHART VIII-1

ELECTRIC POWER TRANSMISSION & DISTRIBUTION EQUIPMENT MARKET SHARE BY COMPANY, 2008
 (\$99.5 billion)

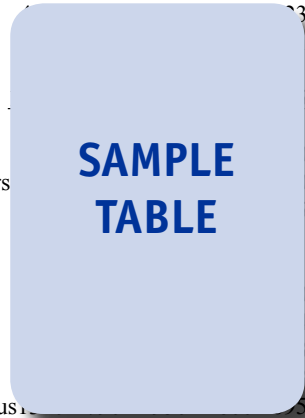


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-8
INDIA -- ELECTRIC POWER EQUIPMENT DEMAND BY MARKET & PRODUCT (million dollars)

Item	1998	2003	2008	2013	2018
Electric Power Generation (bil kWh)					230
\$ elec power equip/000 kWh					5
Electric Power Equipment Demand					0
By Market:					
Electric Utilities					0
Industrial & Nonutility Generators					0
Commercial, Govt & Residential					0
By Product:					
Transformers					0
Power					0
Distribution					0
Other					0
Switchgear/Switchboard Apparatus					50



COMPANY PROFILES

S&C Electric Company
 6601 North Ridge Boulevard
 Chicago, IL 60626
 773-338-1000
<http://www.sandc.com>

Annual Sales:
 Employment:

Key Products: products, reclosers, circuit breakers

S&C Electric Company is a high-voltage switching and distribution equipment manufacturer in outdoor and indoor distribution. In addition to production activities, S&C Electric operates the Power Systems Services unit to provide support for the Company's products.

The Company's products include switchgear, switches, disconnects, fuse products, reclosers, circuit breakers, insulators and power quality devices. Switchgear products made by S&C are manufactured in a number of varieties, including VISTA underground, arc-resistant and padmounted and PMX modular metal-enclosed types. S&C's VISTA underground distribution switchgear products are available for applications through 38 kilovolts (kV). The Company's arc-resistant metal-enclosed switchgear products are available in ratings from 4.16 to 34.5 kV. Padmounted and PMX switchgear products both feature MINI-RUPTER switches, with three-phase, live-switching duties, and FAULT FITER electronic power fuses for tap protection.

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"Demand for electric power equipment in India is forecast to rise a stellar 9.8 percent per year through 2013 to \$7.4 billion. State Electricity Boards (SEBs) dominate India's electricity power generation as well as transmission and distribution sectors, despite some attempts at liberalization over the past decade. At present, India's transmission and distribution sector suffers from extensive inefficiency as well as insufficient penetration in rural areas. This is a result of ..."

--Section VI, pg. 126

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OTHER STUDIES

Electric Power Transmission & Distribution Equipment in China

Demand for electric power equipment in China is projected to grow 10% annually through 2013. Transformers will see the strongest growth while switchgear remains the largest segment. Electric utilities will continue as the dominant market while the industrial segment (including industrial cogenerators) grows the fastest. This study analyzes the 179 billion yuan electric power equipment industry in China, with forecasts for 2013 and 2018 by product, market and region. It also evaluates market share and profiles industry participants.

#2530 08/2009..... \$5200

Electric Transmission & Distribution Equipment

US demand for electric T&D equipment will grow 2.6% yearly through 2013. Gains will be driven by upgrades to the US electric grid, more power generated by independent producers and cogenerators, and the installation of renewable energy systems such as wind. Switchgear and meters (e.g., smart meters) will be the fastest growing types. This study analyzes the \$21 billion US electric T&D industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry competitors.

#2503 06/2009..... \$4600

World Fuel Cells

Global commercial fuel cell demand will triple through 2013 in dollar terms. Portable fuel cell systems will remain the dominant application by unit, while electric power generation will continue as the top use in value terms. PEM chemistry fuel cells will strengthen their dominant position over the next decade. This study analyzes the \$570 million world fuel cell industry, with forecasts for 2013 and 2018 by product, chemistry, application, world region and for 15 national markets. It also details market share and profiles major players.

#2502 05/2009..... \$5800

World Diesel Engines

Global diesel engine demand is forecast to rise 3.5% yearly through 2012. The Asia/Pacific region will remain the largest market while North America will be among the fastest growing based on increased heavy vehicle output and use of diesel engines in light vehicles. Stationary power will be the fastest growing end use segment. This study analyzes the \$129 billion world diesel engine industry, with forecasts for 2012 and 2017 by market, world region and for 26 countries. It also details market share and profiles industry players.

#2470 04/2009..... \$5700

World Turbines

Global turbine demand will rise 4.9% yearly through 2012. Gains in the large Chinese market will slow yet remain well above the average rate, with smaller developing markets growing even faster. Developed regions will also offer good opportunities. Aircraft engines will outpace the larger electric power generation market. This study analyzes the \$83.6 billion world turbine industry, with forecasts for 2012 and 2017 by product, application, world region and for 22 countries. It also evaluates market share and profiles industry players.

#2315 06/2008..... \$5500

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