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# Electric Transmission & Distribution Equipment

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US Industry Study with Forecasts for **2015 & 2020**

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Study #2761 | May 2011 | \$4900 | 323 pages

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*Increases will be fueled in part by rising use of renewable energy sources, many of which will require electric grid upgrades to enable these remote generators to deliver power to customers.*

## US demand to climb 5.2% annually through 2015

US demand for electric transmission and distribution (T&D) equipment is forecast to climb 5.2 percent per year to \$25.8 billion in 2015. Increases will be fueled by continued growth in electricity demand and the rising use of renewable energy sources, many of which will require significant investment in the electric grid to enable these remote generators to deliver power to customers. Gains for electric T&D equipment will also be supported by investment in the US electric grid as part of an effort to modernize and upgrade the system to the so-called "smart grid." In addition, demand from electric utilities will continue to grow as a result of regulatory efforts to ensure that investment in the electric grid is rewarded.

## Meters among products to record fastest sales growth

Meters, molded case circuit breakers and nonutility transformers will record the fastest sales growth among the various products in the electric power transmission and distribution equipment industry. Demand for meters will benefit from the growing use of more advanced and expensive "smart meters" that provide customers with pricing signals and thereby help limit power consumption. These smart meters form an important part of the developing smart grid. Demand for molded case circuit breakers will be supported by the sharp increases in overall construction activity,

## US Electric Transmission & Distribution Equipment (\$20 billion, 2010)



Switchgear  
49%

Transformers  
39%

Meters 6%

Pole/Line Hdw 6%

boosting demand for essential electric equipment. The market for nonutility transformers will be driven by deregulation of the electric power industry in a number of areas, which has led to an increase in electricity generated by nonutility companies.

## Residential, commercial markets to grow fastest

The dominant electric utilities market is expected to record the slowest growth through 2015, as a result of increased prevalence of alternative generating sources like independent power producers (IPPs). The utility market will nevertheless remain the largest in the industry. Gains will be bolstered by increased

investment in the electric grid by utilities. Advances in the industrial sector, which includes nonutility generators, will be spurred by increasing electricity generation by IPPs and cogenerators. Deregulation of the electric power industry will continue to shift demand from utilities to industrial firms and nonutility generators.

The smaller residential market will register the fastest increases through 2015, with gains supported by the sharp turnaround in residential construction activity and residential fixed investment following a period of decline. Similarly, the commercial building market will record above-average gains, as office and commercial construction expenditures rebound.

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## Sample Text, Table & Chart

### MARKETS

#### Government & Institution Consumption & Investment

Federal, state and local governments use a considerable amount of electricity for office space and other buildings, as well as for safety and other purposes. As a result, these various governments require a significant amount of electric power transmission and distribution equipment to protect electric circuits, and to measure and control electricity. Total government expenditures are projected to increase 3.7 percent annually through 2015, decelerating from spending recorded during the 2005-2010 period. This moderation will be partially attributable to an expected slowdown in national defense expenditures.

Defense spending is expected to increase at a 5 percent annual rate through 2015, compared to the 4.2 percent annual rate projected during the 2005 to 2010 period. The reduction in military spending in Afghanistan and Iraq will contribute to the moderation in military spending. However, defense expenditures are bolstered by geopolitical factors, most notably in the Middle East. Nondefense spending at the federal level is expected to rise 4.2 percent per annum through 2015, significantly slowing from the 2005 to 2010 pace. Gains will be limited to some extent by federal budgetary constraints and reduced spending on economic stimulus programs. At the federal level, the movement to reduce the budget deficit will likely have a significant impact on defense spending, which accounted for two-thirds of federal expenditures and investment. Cuts to defense expenditures will likely be less sharp than cuts to other programs that are viewed as less vital to national interests. Nonetheless, the sheer size of the defense budget assures that some funding will be directed toward its funding.

Infrastructure expenditures -- which include highways, railways, aviation, water transportation and resources, water

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TABLE V-3

**ELECTRIC UTILITY MARKET FOR ELECTRIC TRANSMISSION & DISTRIBUTION EQUIPMENT (million dollars)**

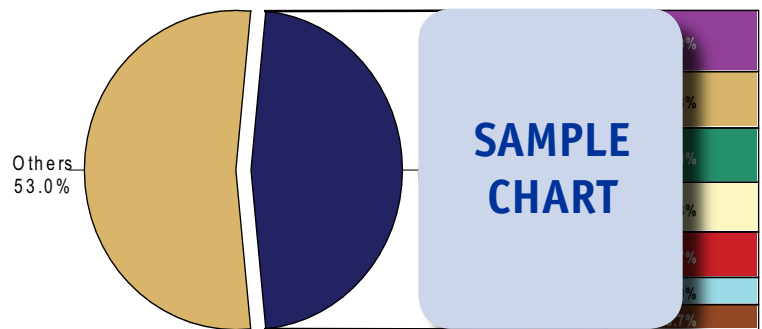
Item	2010	2020
Utility Electric Generation (bil kWh)	20	20
\$ elec T&D equip/000 kWh electric	5	5
Electric Utility Market	80	80
Switchgear	30	30
Transformers	25	25
Hardware & Meters	25	25
% electric utilities	2	2
Total Electric T&D Equipment	150	1200

**SAMPLE TABLE**

**SAMPLE TEXT**

CHART VI-1

**ELECTRIC TRANSMISSION & DISTRIBUTION EQUIPMENT MARKET SHARE BY COMPANY (\$20.1 billion, 2010)**



**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE IV-14**  
**POWER TRANSFORMER SUPPLY & DEMAND**  
 (million dollars)

Item	2000	2005	2010	2015	2020
Electric Utility Equip Expenditures (billions of \$ power transformers/000\$ utility equipment)	18.0	21.5	25.0	28.0	31.0
Power Transformer Demand	15.0	18.0	21.0	24.0	27.0
500 kVA-10 MVA	10.0	12.0	14.0	16.0	18.0
10 MVA-30 MVA	3.0	3.5	4.0	4.5	5.0
30 MVA-100 MVA	1.0	1.2	1.4	1.6	1.8
Over 100 MVA	0.5	0.6	0.7	0.8	0.9
Secondary & Other	0.5	0.7	0.9	1.1	1.3
+ exports	0.0	0.0	0.0	0.0	0.0
- imports	0.0	0.0	0.0	0.0	0.0
Power Transformer Shipments	15.0	18.0	21.0	24.0	27.0

SAMPLE TABLE

COMPANY PROFILES

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

SAMPLE PROFILE

Annual Sales: \$1.7 billion  
 Employment: 10,000

Key Products: High-voltage circuit breakers and other switchgear; power quality devices; reclosers; fuse products; and insulators.

S&C Electric Company manufactures high-voltage switching and protection products, and systems utilized in outdoor and indoor distribution and transmission applications. In addition to production activities, S&C Electric operates the Power Systems Services unit to provide support for the Company's products.

S&C's products include disconnects; switches, circuit breakers and other switchgear; power quality devices; reclosers; fuse products; and insulators. These products are used in such industries as information technology, renewable energy, healthcare, electric utility, power system management, pharmaceutical manufacturing and semiconductor production. Disconnects from S&C include the CIRCUIT-ISOLATOR II disconnect switch, which is intended for systems with voltage ratings between 69 and 138 kilovolt (kV); and LOADBUSTER disconnects, which are used with the Company's LOADBUSTER portable load-break tool to provide universal live switching capabilities. Switches manufactured by S&C include MINI-RUPTER, ALDUTI-RUPTER, SCADA-MATE and OMNI-RUPTER products. MINI-RUPTER three-pole group-operated interrupter switches are suitable for transformer,

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"The market for lower-end power transformers, which consists of the 500 kVA to 10 MVA range, is forecast to rise 6.0 percent per year to \$1.7 billion in 2015. Growth will be driven by a pickup in industrial construction spending, as the industrial market tends to use these lower voltage transformers. A more stable regulatory environment and the growth of cogenerators and IPPs will also support sales advances. Voltage unit upgrades and voltage conversions that increase efficiency will also help fuel gains."  
 --Section IV, pg. 131

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**OTHER STUDIES**

**World Turbines**

Global demand for turbines is projected to increase 6.1 percent annually through 2014. Growth will be driven by the wind turbine segment, but the large turbine engine sector will also post strong gains. The Asia/Pacific region will be among the fastest growing markets and expand its share of demand. This study analyzes the \$98.7 billion world turbine industry with forecasts for 2014 and 2019 by product, application, world region and for 22 countries. It also evaluates company market share and profiles industry competitors.

#2689 ..... November 2010 ..... \$5900

**Solar Energy Products in China**

Solar energy product demand in China will grow 16.6 percent annually through 2013. Solar thermal collectors will remain the dominant type while photovoltaic modules grow the fastest from a small base. Central-East China will continue as the largest regional market. This study analyzes the 23.4 billion yuan solar energy product industry in China, with forecasts for 2013 and 2018 by type and region. It also evaluates company market share and profiles industry participants.

#2613 ..... April 2010 ..... \$5300

**Wind Turbine Systems in China**

Wind turbine system demand in China will rise 5.3 percent yearly through 2013, driven mainly by government policies. Although utility-scale uses will remain dominant, China's distributed wind turbine market is one of the world's largest. Rotor systems and towers will slightly outpace nacelles and other parts. This study analyzes the 48.2 billion yuan wind turbine system industry in China, with forecasts for 2013 and 2018 by type, component, application and region. It also evaluates market share and profiles industry players.

#2576 ..... December 2009 ..... \$5200

**Electric Power Transmission & Distribution Equipment in China**

Demand for electric power equipment in China is projected to grow 10 percent 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 ..... August 2009 ..... \$5200

**World Electric Power Transmission & Distribution Equipment**

Global demand for electric power T&D equipment will rise 5.3 percent per year through 2013. The Asia/Pacific region will grow the fastest. Newer products used with wind and solar energy, and with the oil and gas, mining, and heavy manufacturing industries, will see strong growth. This study analyzes the \$99.5 billion world electric power T&D equipment industry, with forecasts for 2013 and 2018 by market, product, world region and for 20 countries. It also evaluates market share and profiles industry players.

#2529 ..... July 2009 ..... \$5700

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