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Insulated Wire & Cable

US Industry Study with Forecasts for **2017 & 2022**

Study #3036 | June 2013 | \$4900 | 252 pages

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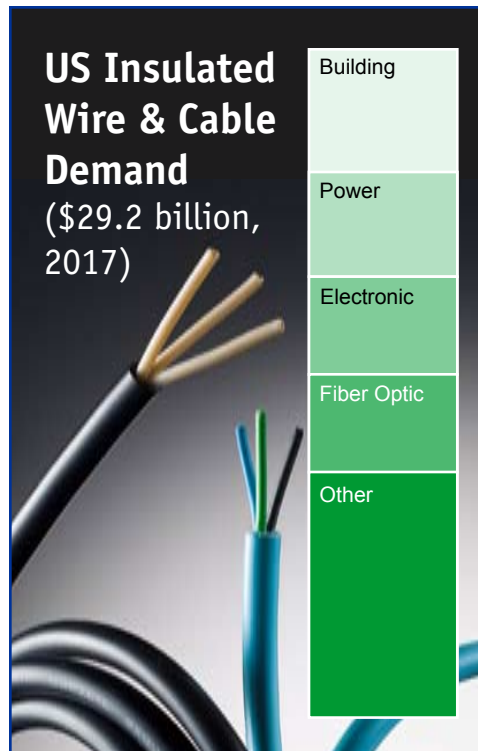
Building construction, particularly new housing, will drive demand for many types of wire and cable, including building, electronic, and power wire and cable products.

US demand to rise 5.8% annually through 2017

US demand for insulated wire and cable is projected to increase 5.8 percent per year through 2017 to \$29.2 billion, recovering from declines during the 2007-2012 period. Building construction, particularly new housing, will drive demand for many types of wire and cable, including building, electronic, and power wire and cable products. In addition, upgrades to the aging US power transmission and distribution network will stimulate gains for power wire and cable and a turnaround in motor vehicle production will benefit advances for primary, ignition, and battery wire and cable.

Telecommunications to remain key market

The telecommunications industry, which utilizes an array of wire and cable products, was the leading market in 2012. Through 2017, growth in the number of electronic devices utilizing wireless technology will dampen demand for cable used to connect devices. However, as the number of devices grows, the computing power of the telecommunications infrastructure will need to increase, requiring the construction of new data centers and wireless cellular towers, both of which are heavy users of insulated wire and cable. In addition, continued investment in "last-mile" infrastructure upgrades by telecommunications providers will stimulate advances.



Fiber optic cable is a vital component of the telecommunications market. After bottoming out in 2003, demand for fiber optic cable picked up at a rapid rate as telecommunications providers invested heavily in laying a fiber optic network to deliver data, television, and voice signals to consumers. The majority of this backbone infrastructure was installed during the past decade. As a result, although fiber optic cable demand will continue to record strong growth, demand increases will moderate through the forecast period. A large share of demand gains going forward will come from last-mile applications, which are still primarily comprised of copper coaxial cable.

Building wire & cable to grow the fastest

Building wire and cable accounted for the largest share of product demand in 2012 as it is used in nearly all residential and nonresidential structures. As a result, the recovering US construction industry will cause demand for building wire and cable to advance at the fastest rate. Growth in the number of new housing units will provide the bulk of demand gains, although increasing construction of commercial, lodging, and office buildings will also boost gains.

Power wire and cable demand will also benefit from growth in construction expenditures, as power lines are needed to connect new housing to the nation's energy grid. Underground cable will experience the strongest segment gains, due to its aesthetic advantages over aerial cable. As the nation's infrastructure ages, necessary upgrades to the current power transmission and distribution network will boost aftermarket gains. In addition, greater capacity superconducting wire will also see greater use.

Study Coverage

This industry study, **Insulated Wire & Cable**, presents historical demand data (2002, 2007, 2012) and forecasts for 2017 and 2022 by material, product and market. The study also considers market environment factors, evaluates company market share and profiles 30 industry competitors.

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Sample Text, Table & Chart

MARKETS

Insulated Wire & Cable Demand

Demand for insulated wire and cable used in motor vehicle forecast to increase 5.7 percent to \$3.1 billion in 2022. Growth will come in large part from motor vehicle production. In addition, construction will stimulate growth, as the amount of wiring required will increase. However, gains will be offset in 2017 and 2012, as growing concern over the amount of weight vehicle will impact demand going forward.

**SAMPLE
TEXT**

Aftermarket demand will also provide some impetus for growth through the forecast period, due to the rising size and age of the US motor vehicle park. However, because many motor vehicle wire and cable products are designed to last the life of the vehicle, these opportunities will remain somewhat limited.

Motor vehicle wire and cable products include automotive primary wire, battery cable, and ignition wire, as well as various other types. (General purpose wire and cable used in these vehicles are excluded from the motor vehicle products category and instead counted under the related product categories.) Motor vehicle wire and cable products are typically used for low voltage lighting and control circuits, and for making connections between battery, starter, and other electrical system components. Due to the different operating conditions in various parts of the vehicle, wire and cable products are often tailored for specific applications of the vehicle. For example, cross-linked polyethylene jacketing is typically used in underhood applications while PVC finds use in chassis wiring. Automotive wire and cable are often bundled into wiring harnesses. (Note: this study includes the value of wire and cable sold to assemble the wiring harnesses, but excludes the value of the harnesses themselves.)

130

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TABLE III-5

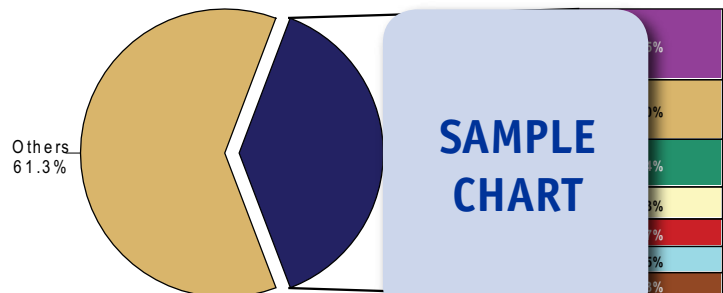
PLASTICS DEMAND IN INSULATED WIRE & CABLE (million pounds)

Item	2002	2007	2012	2017	2022
Wire & Cable Shipments (mil 2005\$) 100 lbs plastics/000\$ wire & cable					
Plastic Insulated Wire/Cable Demand					
Polyethylene:					
Low Density					
High Density & Cross-Linked					
Polyvinyl Chloride					
Polypropylene					
Thermoplastic Elastomers					
Nylon					
Fluoropolymers & Other					

**SAMPLE
TABLE**

CHART VI-1

US INSULATED WIRE & CABLE MARKET SHARE (\$22.0 billion, 2012)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-3
POWER WIRE & CABLE SUPPLY & DEMAND
 (million dollars)

Item	2002	2007	2012	2017	2022
Industrial & Transmission Equip (bil \$)	20	22	24	26	28
\$ wire & cable/000\$ equipment	1.5	1.6	1.7	1.8	1.9
Power Wire & Cable Demand	1.5	1.6	1.7	1.8	1.9
Underground Distribution	0.8	0.8	0.8	0.8	0.8
Portable	0.4	0.4	0.4	0.4	0.4
Other	0.3	0.4	0.5	0.6	0.7
+ net exports	0.0	0.0	0.0	0.0	0.0
Power Wire & Cable Shipments	1.5	1.6	1.7	1.8	1.9
price deflator (2005=100)	100	100	100	100	100
Power Wire/Cable Shpts (mil 2005\$)	1.5	1.6	1.7	1.8	1.9

COMPANY PROFILES

Rea Magnet Wire Company Incorporated

3600 East Pontiac Street
 Fort Wayne, IN 46803
 260-421-7321
<http://www.rea.com>

Annual Sales:
 Employment:

Key Products: continuously
 transposed and

Rea Magnet Wire is a manufacturer of magnet wire and nonferrous wire products. The Company is privately held.

The Company is active in the US insulated wire and cable industry through the manufacture of copper and aluminum magnet wire, and continuously transposed and transformer lead cables.

Rea Magnet Wire makes copper and aluminum magnet wire in film-, glass-, paper-, and polymer-insulated types suitable for use in the production of electric motors, transformers, generators, and coils. Film insulated magnet wire is available with the Company's proprietary FORMVAR modified polyvinyl acetal resin; NYSOL modified polyurethane resin; REABOND S, SUPER HYSLIK 200, SUPER HYSLIK 220, and PULSESIELD SD modified polyester; and PYRE-ML aromatic polyimide resin insulation. Glass insulated magnet wire is offered in round, square, and rectangular varieties that feature Rea Magnet Wire's DAGLAS fiberglass insulation.

Paper insulated magnet wire from the Company is available with 100 percent kraft, manila/kraft, and other types of thermally upgraded

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OTHER STUDIES

Lamps

This study analyzes the US lamp industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by product (fluorescent lamps, high intensity discharge lamps, incandescent lamps, halogen lamps) and market (e.g., buildings, consumer products, motor vehicles, outdoor lighting). The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry players.

#3054 August 2013 \$5300

World Lighting: Lamps & LEDs

World demand for lighting is projected to climb more than 12 percent annually through 2016 to \$78.3 billion. Market gains in developing countries will outpace sales in the US, Western Europe, and Japan. LED (or solid state) lighting devices will record by far the fastest global market gains. This study analyzes the \$43.9 billion global industry for lamps and LEDs used in lighting applications, with forecasts for 2016 and 2021 by product, market, world region and for 18 countries. The study also evaluates company market share and profiles industry participants.

#2979 January 2013 \$6200

World Robots

Global robot demand will rise 10.5 percent annually through 2016 to \$20.2 billion. Five countries -- the US, Japan, Germany, China, and South Korea -- will continue to dominate demand, with the US remaining the largest national market. Smaller, less expensive service robots will outpace more sophisticated, high-value industrial and medical robots. This study analyzes the \$12.3 billion world robot industry, with forecasts for 2016 and 2021 by type, market, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#2950 December 2012 \$6100

Sensors

US sales of sensors are forecast to climb at a 6.1 percent annual rate through 2016 to \$14.9 billion. Process variable sensors will remain the largest category, while chemical property sensors and proximity and positioning sensors will post the fastest growth. Motor vehicles will once again be the leading sensor market as production rebounds from recessionary lows. This study analyzes the \$11.1 billion US sensors industry, with forecasts for 2016 and 2021 by type and market. The study also evaluates company market share and profiles industry competitors.

#2957 October 2012 \$5100

World Lighting Fixtures

Global demand for lighting fixtures will climb 6.9 percent annually through 2016 to \$153 billion. China alone will account for over one third of all new demand, retaining its position as the largest national market. Nonportable indoor lighting fixtures will record the fastest gains, fueled by a recovery in residential construction spending. This study analyzes the \$109.5 billion world lighting fixture industry, with forecasts for 2016 and 2021 by product, market, world region and for 24 major countries. The study also evaluates company market share and profiles industry competitors.

#2946 September 2012 \$6300

About The Freedonia Group

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