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World Electric Transmission & Distribution Equipment

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

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OVERVIEW

INDUSTRY STRUCTURE

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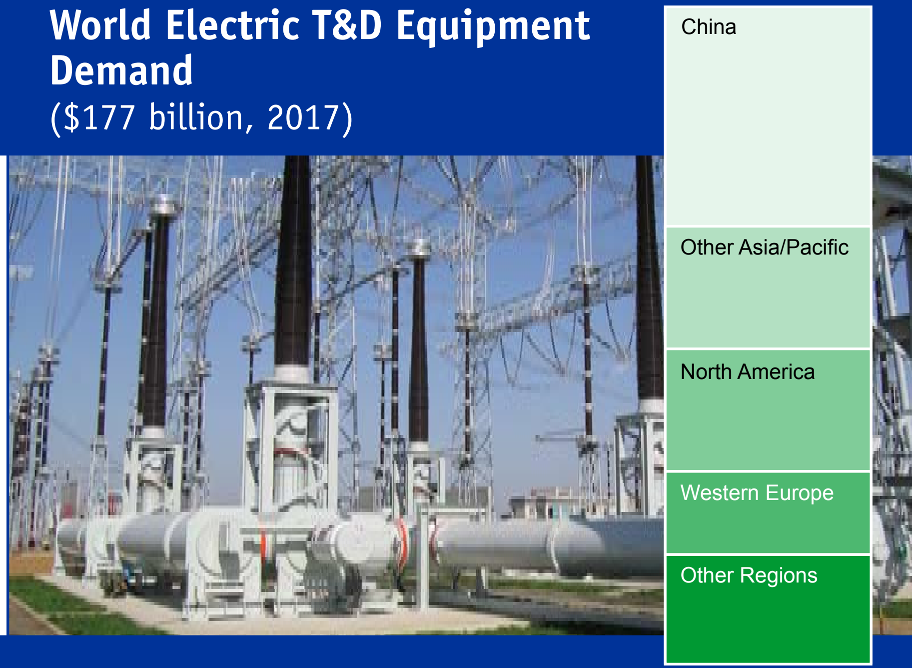
Sales growth will accelerate relative to the 2007-2012 period, aided by both continued strong growth in electricity consumption in developing regions and economic recovery in developed countries.

World demand to rise 6.7% annually through 2017

Global demand for electric transmission and distribution (T&D) equipment is forecast to rise 6.7 percent per year to $177 billion in 2017. Sales growth will accelerate relative to the 2007-2012 performance, aided by both continued strong growth in electricity consumption in developing regions and economic recovery in developed countries. China, which accounted for 27 percent of global demand in 2012, will remain the largest and fastest growing national market for electric transmission and distribution equipment.

World Electric T&D Equipment Demand
($177 billion, 2017)



Asia/Pacific region to remain fastest growing market

The Asia/Pacific region, led by China, will continue to post the fastest gains in demand for electric transmission and distribution equipment. India and Indonesia will also see rapid increases, ranking second and third, respectively, for projected demand growth through 2017. These countries will benefit from both expansion of basic electrification infrastructure and increased electricity consumption. Japan, which was the world's fifth largest market for electric T&D equipment in 2012, will rebound, though growth will continue to be well below the regional average. The 2011 Fukushima disaster and subsequent nuclear shutdown have spurred investment in the country's electricity infrastructure, bolstering demand for electric transmission and distribution equipment. If a permanent nuclear phaseout occurs in Japan, gains in demand for electric power products in the country could be significantly stronger.

Renewable energy projects to drive mature markets

In North America and Western Europe, advances will be driven by the increasing proliferation of renewable energy projects, which will require significant quantities of electric transmission and distribution equipment in order to integrate with electric grids. However, both regions are projected to post below average gains in demand, as they host mature markets with very high electrification rates and substantial existing infrastructure. In Western Europe, investment in electric T&D equipment will be driven by the need to meet the aggressive renewable energy mandates set by the EU.

Wind power is expected to represent the largest component of new renewable energy, especially offshore wind installations in the North Sea. Such projects require a variety of electric transmission and distribution equipment, including power transformers and distribution transformers. Offshore wind projects also commonly are linked to high-voltage direct current (HVDC) transmission lines, which use specialized transformers and advanced switchgear.

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Sample Text, Table & Chart

TABLE VI-8

INDIA: ELECTRIC TRANSMISSION & DISTRIBUTION EQUIPMENT DEMAND BY MARKET & PRODUCT (million dollars)

Item	2002	2007	2012	2017	2022
Electric Power Generation (bil kWh)					
$ equipment/000 kWh					
Electric T&D Equipment Demand					
By Market:					
Electric Utilities					
Industrial & Nonutility Generators					
Commercial, Gov't, Residential					
By Product:					
Transformers					
Power					
Distribution					
Other					
Switchgear/Switchboard Apparatus					

SAMPLE TABLE

ASIA/PACIFIC

India: Demand by Market & Product

The market for electric transmission and distribution eq
in India is forecast to rise 9.9 ... billio
Sales growth in India over t ... ina w
Gains will be supported by a ... ent a
upgrades and expansion of t ... elect

SAMPLE TEXT

Despite significant gain ... uch
population still lacks electricity ... large
of rural northern and eastern India, less than 50 percent of ho
access to electricity. In Bihar state, only one-sixth of househ
electricity. Although electrification levels in these parts of In
expected to remain relatively low for the immediate future, th
number of people who still lack electricity indicates that the Indian market for electric transmission and distribution equipment holds significant potential for continued long-term growth.

The necessity of upgrading India's electrical grid has become a much more prominent issue in recent years, following a series of well-publicized blackouts. Most notably, the country suffered the world's largest ever power failure in July 2012, when separate blackouts occurring on consecutive days impacted as many as 600 million people. Following the event, Power Grid Corporation of India, which controls half of the country's electric transmission capacity, announced th
double its 2007-2012 levels of new transmission lines over t
2017 period. Investment in new transmission lines will spur
distribution transformers and high-voltage switchgear.

The utilities market for electric transmission and distrib
ment is expected to post above average growth, reflecting sig
outlays by utilities to expand and upgrade the grid. Demand

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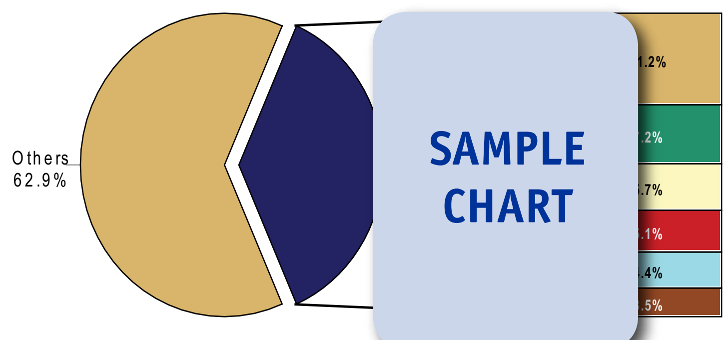
CHART VIII-1

WORLD ELECTRIC TRANSMISSION & DISTRIBUTION EQUIPMENT MARKET SHARE ($127 billion, 2012)



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Sample Profile, Table & Forecast

TABLE VI-7

INDIA: ELECTRIC TRANSMISSION & DISTRIBUTION EQUIPMENT SUPPLY & DEMAND (million dollars)

Item	2002	2007	2012	2017	2022
Population (millions)					
GDP/capita					
Gross Domestic Product (bil 2011$)					
Electric Power Generation (bil kWh)					
Gross Fixed Investment (bil 2011$)					
$ equipment/000 kWh					
$ equipment/000$ GFI					
Electric T&D Equipment Demand					
net exports					
Electric T&D Equip Shipments					

SAMPLE TABLE

COMPANY PROFILES

DELIXI Group Company Limited
Delixi Industrial Park
Yueqing, Zhejiang 325604
China
86-577-6272-
http://www.de

Annual Sales:
Employment:

Key Products ... transmission
and distributio

SAMPLE PROFILE

DELIXI Group is a privately held manufacturer of electric transmission and distribution equipment. The Company markets its products in more than 40 countries worldwide, in addition to selling products via a network of more than 1,000 distributors in China.

The Company is active in the world electric power transmission and distribution equipment industry via the manufacture of circuit breakers, fuses, and other electric power transmission and distribution products. Among DELIXI Group's circuit breakers are residual, molded case, air, and miniature types. Specific products include CDL7 residual circuit breakers, which provide over-current protection, and electric shock protection resulting from indirect contact; CDM7 molded case circuit breakers engineered for power distribution networks with alternating currents of 50/60 hertz, rated current of 800 amperes (A), rated work voltage of 690 volts, and rated insulated voltage of 690 volts; CDW2 air circuit breakers designed for currents ranging from 630 to 4,000 A; and CDB2 miniature circuit breakers, which feature a compact design, and high breaking and rapid tripping capabilities. The Company's. fuses are available in cylindrical, high-voltage current

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STUDY COVERAGE

World Electric Transmission & Distribution Equipment, a Freedonia industry study, offers historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 for supply and demand, as well as demand by product and market in six regions and 20 countries. The study also details market environment factors, evaluates company market share and profiles 29 competitors in the global industry.

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Other Studies

World Fuel Cells

Global demand for commercial fuel cells will almost triple to $4 billion in 2017 and then triple again by 2022 to $12 billion. Motor vehicle, portable electronics, and industrial stationary/motive power applications will grow the fastest. Japan and the US will remain by far the largest markets, while China and South Korea will grow the fastest. This study analyzes the $1.5 billion world fuel cell industry, with forecasts for 2017 and 2022 by product, chemistry, application, world region, and for 16 countries. The study also evaluates company market share and profiles industry players.

#3140 .... April 2014 .... $6300

Batteries

US demand for primary and secondary batteries is expected to grow 4.2 percent per year to $17.1 billion in 2017. Lithium batteries will offer the best growth opportunities in both the rechargeable and primary battery segments. Secondary batteries will continue to supplant primary batteries as high-drain electronic devices increase in popularity. This study analyzes the $13.9 billion US battery industry, with forecasts for 2017 and 2022 by product and market. The study also reviews battery technology, evaluates company market share and profiles industry players.

#3075 .... November 2013 .... $5300

World Electric Motors

World demand for electric motors is projected to increase 6.5 percent per year to $122.5 billion in 2017. The Asia/Pacific region will be the largest source of market growth through 2017. Demand for AC motors will outpace DC types. Motor vehicles and heating and cooling equipment will be the fastest growing markets. This study analyzes the $89.4 billion world electric motor industry, with forecasts for 2017 and 2022 by product, market, world region, and for 30 countries. The study also evaluates company market share and profiles industry players.

#3055 .... October 2013 .... $6100

Electric Transmission & Distribution Equipment

US demand for electric power transmission and distribution (T&D) equipment is forecast to climb 4.8 percent annually to $30.4 billion in 2017. Electric meters will be the fastest growing type, driven by the ongoing development of the “smart grid.” Electric utilities will remain the largest market, while residential uses will grow the fastest. This study analyzes the $24 billion US electric T&D equipment industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry competitors.

#3029 .... May 2013 .... $5100

World Turbines

The world market for turbines and related products (turbine-based engines, generators, and generator sets) is forecast to rise 6.4 percent annually to $162 billion in 2016. Wind turbines will remain the largest and fastest growing segment (albeit at a more moderate rate), while demand for gas combustion turbines will accelerate. This study analyzes the $119 billion world turbine industry, with forecasts for 2016 and 2021 by application, product, world region and for 22 countries. The study also evaluates company market share and profiles industry competitors.

#3009 .... March 2013 .... $6100

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