INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Electric Power Transmission & Distribution Equipment

Industry Study with Forecasts for **2019 & 2024**

Study #3256 | February 2015 | $5300 | 318 pages

Freedonia®

The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

email: info@freedoniagroup.com

www.freedoniagroup.com

Electric Power Transmission & Distribution Equipment

Industry Study with Forecasts for *2019 & 2024*

Freedonia®

Table of Contents

(continued on following page)

Electric Power Transmission & Distribution Equipment

Industry Study with Forecasts for ***2019 & 2024***

Freedonia®

Table of Contents

COMPANY PROFILES

(continued from previous page)

List of Tables

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

REGULATIONS & TECHNOLOGY

PRODUCTS

MARKETS

INDUSTRY STRUCTURE

List of Charts

MARKET ENVIRONMENT

REGULATIONS & TECHNOLOGY

PRODUCTS

MARKETS

INDUSTRY STRUCTURE

Electric Power Transmission & Distribution Equipment

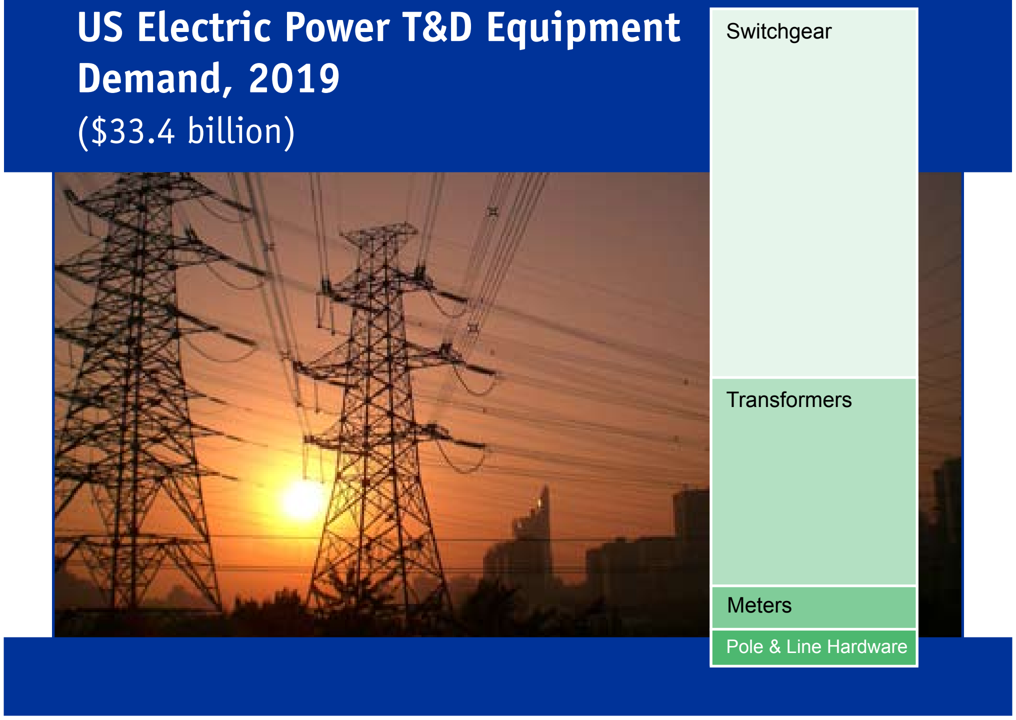
Industry Study with Forecasts for ***2019 & 2024***

Growth in electricity generation by IPPs and NUGs, as well as greater electrical output using renewable resources, will boost sales as these operations are added to the electric grid.

US demand to rise 5.5% annually through 2019

US demand for electric power transmission and distribution (T&D) equipment is expected to rise 5.5 percent annually through 2019 to $33.4 billion. Growth in electricity generation by independent power producers (IPPs) and nonutility generators (NUGs), as well as greater electrical output using renewable resources, will result in increased product sales, since these operations need to be appropriately equipped to deliver power to the electric grid. Furthermore, efforts to modernize the electric grid and to improve efficiency and reliability will support market advances via the incorporation of "smart" technologies that provide a number of advantages over, but also cost considerably more than, conventional equipment.

US Electric Power T&D Equipment Demand, 2019
($33.4 billion)



Two-way meters to be fastest growing segment

Advanced metering infrastructure meters (those featuring two-way communication) are forecast to record the strongest demand gains of any electric power T&D equipment product. Suppliers will benefit from the ongoing development of the "smart grid" and related sales of "smart meters." The ability of these meters to provide automated readings on electricity inflows and outflows, which are necessary for participation in distributed generation and net metering programs, will also boost product demand. Sales of power circuit breakers, metal-clad and metal-enclosed switchgear, and molded case circuit breakers, as well as power and nonutility transformers, will benefit from the expansion of the industrial and NUG market.

Residential market to see most rapid growth

The largest and most traditional markets for electric power T&D equipment are the electric utilities and industrial sectors. In 2014, electric utilities accounted for 53 percent of total demand, with the industrial sector -- including NUGs -- representing an additional 32 percent. Growth in these markets will be supported by increasing electricity generation by IPPs and NUGs, which will require heavy investment by these firms to protect sensitive industrial machinery and to connect new facilities to the grid. In addition, rising spending by electric utilities will provide opportunities, even though these increases will moderate from the strong pace of the past decade.

The much smaller residential electric power T&D equipment market will register the fastest gains through 2019 as residential construction continues its recovery from 2009 lows and updates to the National Electric Code lead to greater use of more advanced, but also more expensive, arc-fault circuit interrupters. In contrast, both the commercial and the government and institutional markets will post below average increases, with the latter expanding the slowest.

Electric Power Transmission & Distribution Equipment

Industry Study with Forecasts for ***2019 & 2024***

Freedonia®

Sample Text, Table & Study Coverage

TABLE V-7

COMMERCIAL MARKET FOR ELECTRIC POWER T&D EQUIPMENT (million dollars)

Item	2004	2009	2014	2019	2024
Commercial Electricity Demand (bil kWh)					
$ T&D equipment/000 kWh electricity					
Commercial T&D Equipment Demand					
By Product:					
Switchgear					
Transformers					
By Sector:					
Mercantile & Service					
Office					
Lodging					
Food Sales & Service					
Warehouse & Other					
% commercial					
Total Electric Power T&D Equip Demand					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

MARKETS

Electric Power T&D Equipment Demand

Demand for electric power T&D equipment in the gove and institutional market is projected to grow the slowest of a mar perce to $ e. Ef redu imit n mov ixed i and tures sale for el T&D ent inv infrastructure. This infrastructure spending includes funding ways and maintenance and new construction of public educa healthcare facilities, as well as other government buildings. expansion and improvement projects are also included.

SAMPLE TEXT

Nondefense spending will provide new sales opportunities in many government and institutional markets, particularly at the state and local levels. For example, programs aimed at improving government energy efficiency will spur increased demand for energy saving lighting, including high intensity discharge lights and, therefore, HID ballasts. Furthermore, the expected rebound in defense spending will boost sales of products like circuit breakers, fuses, and switchgear, which are used to protect circuitry in military vehicles.

As government spending on infrastructure projects accelerates, highway expenditures are expected to account for a sizeable share of the expenditures total. This trend will lead to increased sales of HID lamp ballasts and other transformers. Higher funding for improvements to bridges, overpasses, and tunnels will also stimulate sales gains for these products. The construction of new government buildings and military facilities typically plays a limited role in this market, yet these buildings generate a significant amount of replacement and repair product demand.

191

STUDY COVERAGE

This 318-page Freedonia study, ***Electric Power Transmission & Distribution Equipment***, presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by product and market. The study also examines regulations and technology, analyzes market environment factors, assesses the industry structure, evaluates company market share and profiles 34 US industry competitors.

Click here to purchase online

Order now, click here!

Electric Power Transmission & Distribution Equipment

Industry Study with Forecasts for ***2019 & 2024***

Sample Profile, Table & Chart

TABLE IV-3

LOW VOLTAGE SWITCHGEAR SUPPLY & DEMAND
(million dollars)

Item	2004	2009	2014	2019	2024
Building Construction Expenditures (bil $)					
$ low voltage/000$ construction					
Low Voltage Switchgear Demand					
Panelboards					
Distribution Switchboards					
Switches					
Other Low Voltage Switchgear					
+ exports					
- imports					
Low Voltage Switchgear Shipments					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

COMPANY PROFILES

AZZ Incorporated
1 Museum Place, Suite 500
3100 West 7th Street
Fort Worth, TX 76107
817-810
http://ww

Revenue
Employ

Key Pro ... stems,
bution e ... formers

SAMPLE PROFILE

AZZ Incorporated manufactures and supplies lighting fixtures, bus duct, and electrical power distribution centers and assemblies for industrial, petrochemical, and power generation and transmission applications. The Company operates in two segments: Electrical and Industrial Products and Services, and Galvanizing Services.

The Company is active in the US electric power transmission and distribution equipment industry through the Electrical and Industrial Products and Services segment, which had revenues of $416 million and employed 1,160 in FY 2014. Of the segment's total FY 2014 revenues, US product sales generated $322 million. Via this segment, AZZ designs, manufactures, tests, and installs products that distribute electrical power under such brand names as CENTRAL ELECTRIC, CALVERT, ATKINSON, CGIT, and NLI.

The Electrical and Industrial Products and Services segment conducts production activities in the US at facilities in Crowley, Houston, Fort Worth, College Station, and Spring, Texas; Richland, Mississippi;

 225

CHART III-1

STATUS OF RETAIL ELECTRIC UTILITY DEREGULATION, 2014

Source: The Freedonia Group, Inc.

SAMPLE CHART

Order Information

Five Convenient Ways to Order

INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Freedonia®

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or +1 440.684.9600

FAX: +1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional $2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, email it to coworkers around the world, or print it as many times as you like.

Click here to learn more about the Corporate Use License

Order Form

F-WEB.3256

Electric Power Transmission & Distribution Equipment...... $5300

☐ Corporate Use License (add to study price) * +$2600

___ Additional Print Copies @ $600 each *

Total (including selected option) $________

☐ Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 8% sales tax)

☐ Bill my company ☐ American Express ☐ MasterCard ☐ Visa

Credit Card # Expires mm/yy Security Code

Signature ________

Name ________

Title ________

Company ________

Division ________

Street ________
(No PO Box please)

City/State/Zip ________

Country ________

Phone ________ Fax ________

Email ________

* Please check appropriate option and sign below to order an electronic version of the study.

☐ Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature ________

☐ Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add $2600; one additional user, add $600; two additional users, add $1200; three additional users, add $1800.

Signature ________

Related Studies

Electric Motors

US electric motor demand will rise 5.4 percent per year through 2018 to $16.2 billion. Growth in the dominant AC motors segment will outpace DC types. The motor vehicle market will grow the fastest and remain the largest category, followed by the heating/cooling and machinery markets. IHP electric motors will outpace FHP types in both value and volume terms. This study analyzes the $12.5 billion US electric motor industry, with forecasts for 2018 and 2023 by type, power rating, and market. The study also evaluates company market share and profiles industry players.

#3238 .... December 2014 .... $5200

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

Wind Turbine Systems

US demand for wind turbine systems is forecast to reach $18.9 billion in 2018, a nearly ninefold increase over severely depressed 2013 levels. The market for wind turbines tends to be highly volatile due to its reliance on government incentives. Feed-in tariff payments and various grants from the Department of Energy will drive gains going forward. This study analyzes the $2.1 billion US wind turbine system industry, with forecasts for 2018 and 2023 by type, component, application and US region. The study also evaluates company market share and profiles industry players.

#3139 .... March 2014................... $5100

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

World Electric Power Transmission & Distribution Equipment

Global demand for electric transmission and distribution (T&D) equipment will rise 6.7 percent annually to $177 billion in 2017. The Asia/Pacific region, led by China, will continue to post the fastest gains. In North America and Western Europe, advances will be driven by the increasing proliferation of renewable energy projects. This study analyzes the $127 billion world electric T&D equipment industry, with forecasts for 2017 and 2022 by market, product, world region and for 20 countries. The study also evaluates company market share and profiles industry players.

#3071 .... September 2013................ $5900

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

Click here to learn more about Freedonia

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

Click here to learn more about Custom Research

Click here for complete title list

Click here to visit freedoniagroup.com

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Website: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • Email: info@freedoniagroup.com