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# Insulated Wire & Cable

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US Industry Study with Forecasts for 2019 & 2024

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Study #3260 | May 2015 | \$5300 | 261 pages

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### INDUSTRY STRUCTURE

1 US Insulated Wire & Cable  
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*An expected strong recovery in construction expenditures will fuel growth in US demand for several types of wire, including building, power, and magnet.*

## US demand to rise 6% annually through 2019

Insulated wire and cable demand in the US is projected to increase 6.0 percent annually to \$27.2 billion in 2019, as the market continues to recover from its depressed 2009 level. A strong expected recovery in construction expenditures will fuel growth in demand for several types of wire, including building, power, and magnet wire and cable.

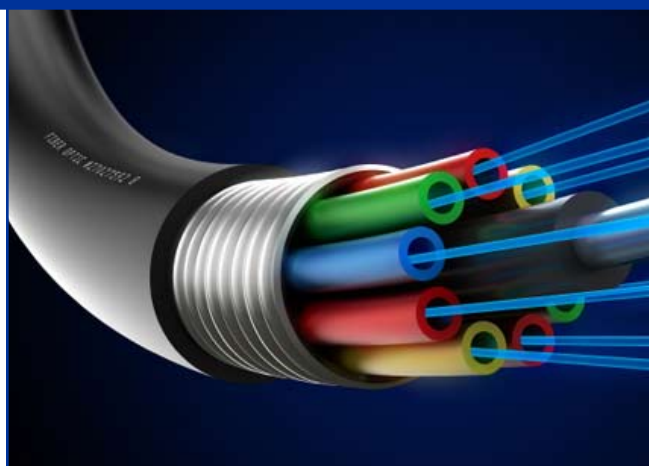
## Building wire & cable to offer best opportunities

Among the different product types, building wire and cable held the largest share of demand in 2014 and will see the most rapid advances through 2019, reaching \$8.3 billion. An acceleration in growth of building construction expenditures, after a period of tepid improvement between 2009 and 2014, will drive advances. Among other types, power, magnet, and fiber optic wire and cable will also see strong advances. On the other hand, due to slow growth in US motor vehicle production through 2019, primary, ignition, and battery wire and cable demand will see a pronounced deceleration from the previous five-year period, when demand was driven by robust increases in vehicle output.

## Construction to be fastest growing market

Among the major markets for insulated wire and cable, construction is forecast to see the fastest growth. In addition to

## US Insulated Wire & Cable Demand, 2019 (\$27.2 billion)



Building

Power

Electronic

Apparatus

Other Types

building wire, rising construction expenditures will also benefit demand for other types of wire used in building construction, such as coaxial cable.

Electrical equipment was the largest market for insulated wire and cable in 2014 at \$5.8 billion. Demand in this market is projected to increase 3.9 percent per annum through 2019. Increasing electricity production -- as well as use of new sources of power generation, such as solar and wind farms -- will increase demand for power transmission and distribution wire. However, decelerating growth in the production of appliances and other electrical equipment will restrain increases in demand for other types of wire and cable used in the electrical equipment

market, such as appliance wire and hook-up wire. Slower price growth than between 2004 and 2014 will also limit advances in spending on wire for electrical equipment.

The telecommunications market also uses a vast array of wire and cable products with demand in this market projected to reach \$5.4 billion in 2019. The continued use of electronic devices that rely on wireless technology will reduce demand for the wire and cable historically used to connect such devices. However, the growing use of electronic devices will also require continued improvements to the existing telecommunications infrastructure, especially in last-mile upgrades.

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## Sample Text, Table & Chart

### PRODUCTS

#### Fiber Optic Cable

Fiber optic cable demand totaled \$1.5 billion in 2014. In 2014, fiber optic cable experienced a sharp peak around the beginning of the 21st century during a period of rapid expansion of the fiber optic work due to optimistic expectations for data traffic over communication networks. After a sharp decline, demand advanced through 2008 with construction spending and investment in fiber networks for television, phone, and Internet signals to consumers. However, demand was still only around half of the 2000 level.

Through 2019, fiber optic cable demand is projected to total \$2.2 billion, an acceleration from the \$1.5 billion in 2014. However, marginal declines in communications utilities construction will restrain more rapid growth. In competition with other types of cable, such as coaxial cable for communications applications. Frequently, fiber is used for fiber-coaxial networks, where fiber is used for the backbone network, while coaxial cable is used for the access network. Fiber optic cable demand in such applications is largely built out through 2014. Imports from countries like China are expected to continue, but the US trade surplus is expected to continue, which will limit prices for fiber optic cable that limited growth through the forecast period.

Imports of fiber optic cable are expected to total \$2.2 billion through 2019 to \$2.2 billion. While production in production was robust between 2004 (when the bust in fiber demand after 2001 caused a sharp decline) and 2008, production was more stable through 2014. Imports from countries like China are a significant portion of demand in 2004, but the US trade surplus is significantly with the moderate growth in domestic demand.

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SAMPLE  
TEXT

TABLE V-9

### CONSTRUCTION WIRE & CABLE DEMAND (million dollars)

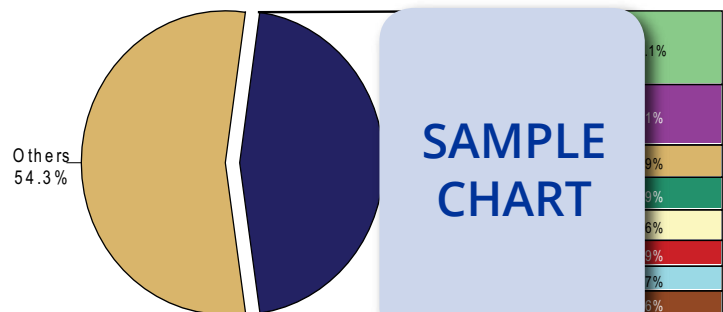
Item	2004	2009	2014	2019	2024
Construction Expenditures (bil \$) \$ wire & cable/000\$ construction					
Construction Wire & Cable Demand					
By Application:					
Building					
Residential					
Nonresidential					
Nonbuilding					
By Product:					
Building Wire & Cable					
Telephone & Other Wire Products					
% construction					
Insulated Wire & Cable Demand					

SAMPLE  
TABLE

Source: The Freedonia Group, Inc.

CHART VI-1

### US INSULATED WIRE & CABLE MARKET SHARE, 2014 (\$20.3 billion)



SAMPLE  
CHART

## Sample Profile & Table, & Study Coverage

**TABLE III-5**  
**PLASTICS DEMAND IN INSULATED WIRE & CABLE**  
 (million pounds)

Item	2004	2009	2014	2019	2024
Wire & Cable Shipments (mil 2009\$) lbs plastic/000\$ wire & cable					
Plastics Demand in Insulated Wire & Cable					
Polyvinyl Chloride					
Polyethylene:					
Low Density					
High Density & Cross-Linked					
Polypropylene					
Thermoplastic Elastomers					
Nylon					
Fluoropolymers & Other					

Source: The Freedonia Group, Inc.

### COMPANY PROFILES

#### United Copper Industries Incorporated

2727 Geesling Road  
 Denton, TX 76208  
 940-243-7500  
<http://www.uciwire.com>

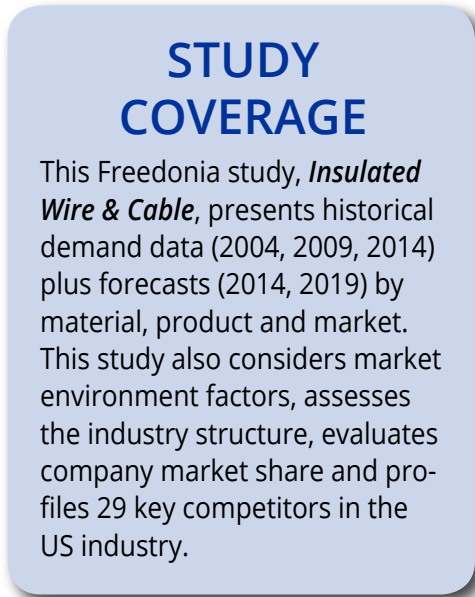
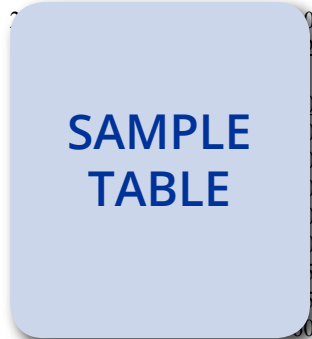
Annual Sales  
 Employment

Key Products: Building wire and cables

United Copper Industries produces building wire and cable products for electrical distribution applications in the residential, commercial, and industrial construction markets. The Company is owned by private equity firm KPS Capital Partners LP (New York, New York).

The Company participates in the US insulated wire and cable industry via the production and sale of copper building wire and metal-clad cables for electrical distribution end uses in residential, commercial, and industrial buildings. United Copper Industries conducts manufacturing and distribution operations at a facility in Denton, Texas. The Company markets products in the US via a network of national, regional, and local electrical distributors.

United Copper Industries makes 600-volt (V) copper building wire in THHN, THWN-2, XHHW-2, MTW, TFFN, NM-B, and UF-B models. These wires are composed of solid or stranded copper conductors, polyvinyl chloride (PVC) or crosslinked polyethylene insulation, and PVC or nylon jackets. Among the Company's cable products are 600-V metal-clad cables in standard, multiconductor, ground, oversized neutral, multi-neutral, and healthcare facility-grade types having solid or stranded conductors, PVC insulation, nylon jackets, and interlocked





## Related Studies

### Electric Power Transmission & Distribution Equipment

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. Switchgear and pole and transmission line hardware will be the fastest growing products. The residential sector and industrial and nonutility generators will be the fastest growing markets. This study analyzes the \$25.5 billion US electric power T&D equipment industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry competitors.

#3256..... February 2015.....\$5300

### 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 Industrial Rubber Products

Global demand for industrial rubber products will rise 6.6 percent annually to \$158 billion in 2018. More than half of all additional product demand will be accounted for by China. Rubber hose will be the fastest growing product segment. Industrial equipment and construction will be the fastest growing markets. This study analyzes the \$115 billion world industrial rubber product industry, with forecasts for 2018 and 2023 by market, product, world region, and for 27 countries. The study also evaluates company market shares and profiles industry players.

#3230..... December 2014.....\$6300

### World Insulation

Through 2018, global demand for insulation will rise 5.0 percent annually to 24.9 billion square meters of R-1 value. The Asia/Pacific region will grow the fastest, driven by building construction activity and manufacturing and industrial output. Foamed plastic insulation will lead value gains. This study analyzes the current world industry, at 19.5 billion square meters of R-1 value, with forecasts for 2018 and 2023 by material, market, world region, and for 21 countries. The study also evaluates company market share and profiles industry players.

#3206..... October 2014.....\$6500

### World Lighting Fixtures

Global demand for lighting fixtures is projected to increase at a 6.9 percent annual rate through 2018 to \$176 billion. China will remain the largest while India grows the fastest. The dominant nonportable lighting fixture segment will experience the most rapid growth. The key construction market will grow the fastest. This study analyzes the \$126 billion world lighting fixture industry, with forecasts for 2018 and 2023 by product, market, world region, and for 20 countries. The study also evaluates company market share and profiles industry competitors.

#3192..... August 2014.....\$6400

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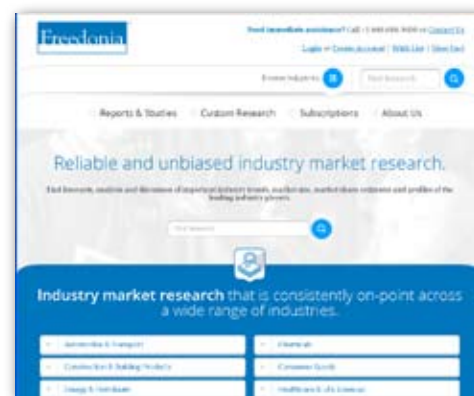
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