

Circuit Breakers & Fuses

US Industry Study with Forecasts for 2020 & 2025

Study #3471 | September 2016 | \$5100



The electric power market is the largest end user of circuit breakers and fuses and will remain so through 2020 as power utilities increase their construction spending. However, the residential market for circuit breakers and fuses will post the strongest gains through 2020, bolstered by yearly increases in construction spending. Growth prospects will also be favorable in the nonresidential market, as construction spending grows at nearly five percent per annum. Suppliers serving the nonresidential segment will also benefit from the higher value of product utilized there relative to many residential applications. The increasing prevalence of electrical and electronic components in motor vehicles, as well as the growing popularity of hybrid and electric vehicles, will bolster circuit protection device demand on a per vehicle basis.

Circuit breakers outpace fuses

Circuit breaker sales will outpace fuse sales through 2020. However, the difference in growth rates will continue to become less pronounced. Circuit breakers have already replaced fuses in most of the applications where practical, and as a result fuse suppliers are not losing market share at the rate they once were. Furthermore, the growing use of certain direct current (DC) power applications, such as solar power generation, will benefit fuse manufacturers, as DC power poses some difficulties for circuit breaker usage. Still, circuit breaker manufacturers will continue to benefit from their products' performance advantages

relative to fuses in many applications, as well as their relative higher value.

US electric grids play important role in growth

Power circuit breakers are expected to post the strongest gains of any major product category through 2020, driven by efforts to expand and update the US electrical grids, as well as by the increasing utilization of these products by independent power producers and nonutility generators. In addition, technological advances will support sales of higher value power circuit breakers such as those with integrated condition monitoring features.

Study coverage

This study examines the US market for circuit breakers and fuses. It presents historical data (2005, 2010, 2015) plus forecasts (2020, 2025) by product type for circuit breakers (molded case, power, parts and accessories) and fuses (high power, cartridge and plug, electronic, other, parts and accessories), and by market (machinery, electric power, automotive, nonresidential and residential building construction, electronic equipment, electrical equipment, automotive and nonautomotive transportation equipment). The study also considers key market environment factors, assesses the industry structure, and evaluates company market share.

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CIRCUIT BREAKERS

Molded Case Circuit Breakers Supply & Demand

percent per year
maker market a
2010-2015 pe
duct segment,
action activity
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istered during the 2010-2015 period, but approximating the growth
forecast in demand. Both imports and exports are projected to inc
at roughly the same rate through 2020, although the US trade defic
these products will expand. The low cost and well established tec
ogy required to produce MCCBs allows many smaller producers in less
developed countries to compete in this market. This is exemplified by
the Dominican Republic's role as a leading overseas source of supply
for MCCBs. The reason for this is the presence of several large MCCB
assembly plants in the small Caribbean nation, which imports parts for
final assembly before exporting them back to the US or Western Europe.

Molded case circuit breakers derive their name from the insulated
molded nonmetallic case that contains all of the components of the

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TABLE VI-7

MACHINERY MARKET FOR CIRCUIT BREAKERS & FUSES (million dollars)

Item	2005	2010	2015	2020	2025
Machinery Shipments (bil \$) \$ CB&F/000\$ machinery					
Machinery Market By Product: Circuit Breakers Fuses					
By Application: Original Equipment Manufacturing Maintenance/Repair/Operations					
% machinery					
Total Circuit Breaker & Fuse Demand					

Source: The Freedonia Group

TABLE V-2

HIGH-POWER FUSE DEMAND (million dollars)

Item	2005	2010	2015	2020	2025
Electric Utilities Construction (bil \$) \$ fuses/000\$ construction					
High-Power Fuse Demand Power Fuses & Fuse Links Distribution Cutouts					
% high-power					
Total Fuse Demand					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

Power Tools

US demand for power tools is expected to expand 4.0 percent per annum through 2020 to \$7.2 billion. Electric tools will continue to post the fastest gains, outpacing growth in demand for pneumatic and other power tools. The professional market will post faster gains than the consumer market, driven by continued strength in building construction. This study assesses the \$6.0 billion power tools market, offering forecasts for 2020 and 2025 for demand by type, market and channel of distribution. The study also evaluates company market share and profiles industry players.
#3380.....June 2016..... \$4900

World Elevators

Global demand for elevator equipment and services is forecast to grow 5.9 percent annually to \$121 billion in 2019. Growth in the leading Chinese market will slow but still rise 10 percent annually. The emphasis on space and energy saving technologies such as machine room-less (MRL) elevators will continue to increase. This study analyzes the \$91 billion world elevator industry, with forecasts for 2019 and 2024 by product and service for six world regions and 20 major countries. The study also evaluates company market share and profiles industry players.
#3324..... October 2015 \$6300

Insulated Wire & Cable

US insulated wire and cable demand will rise 6.0 percent annually to \$27 billion in 2019. Building wire and cable will remain the largest product segment and will be by far the fastest growing, followed by magnet and power wire and cable. Construction will be the fastest growing market, surpassing electrical equipment to become the largest segment. This study analyzes the \$20.3 billion US insulated wire and cable industry, with forecasts for 2019 and 2024 by material, product, and market. The study also evaluates company market share and profiles industry players.
#3260..... May 2015 \$5300

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

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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