



GLOBAL ELECTRICITY TRANSMISSION EQUIPMENT MARKET REPORT, 2018-2027

Global Transmission Research has just released the third edition of the Global Electricity Transmission Equipment Market Report. The report is a comprehensive and up-to-date study of the global demand for high voltage electricity transmission equipment over the period 2018-2027. The report focuses on high voltage transmission equipment of 110 kV and above levels.

It covers six major equipment markets—transmission towers, conductors and cables, insulators, power transformers, high voltage switchgears and reactors. It provides an analysis on the expected growth in demand, both in value and volume terms, in these segments across six regions—North America, Latin America, Asia, Europe, the Middle East and Africa. An in-depth analysis is also provided separately for 20 key growth markets.

The report describes recent trends and developments in the six equipment segments in terms of product and technology, market, and pricing and costs. In addition, the report showcases recent equipment contracts and awards, and profile key equipment manufacturers and suppliers by segment.

The report comprises eight distinct sections.

Part I of the report provides an executive summary.

Part II of the report provides an analysis of the global transmission equipment market and comprises the following sections:

- ❖ State of the global electricity transmission industry, 2017
- ❖ Recent equipment market trends and developments such as product and technology trends, market trends and developments, and equipment pricing and cost trends
- ❖ Expected growth in the global transmission industry, 2018-2027
- ❖ Key growth drivers for the transmission equipment industry
- ❖ Market forecast synopsis for transmission equipment, 2018-2027, in terms of both value and volume
- ❖ Snapshot of key growth markets
- ❖ Overview of key equipment manufacturers and suppliers, by equipment
- ❖ Challenges and outlook

Part III of the report provides an analysis and demand projections for the six equipment segments:

- ❖ Transmission towers
- ❖ Conductors and cables

- ❖ Insulators
- ❖ Power transformers
- ❖ Switchgears
- ❖ Reactors

For each equipment category, a detailed analysis is provided in terms of:

- ❖ Recent trends and advances—product and technology trends, market trends, and pricing and costing trends
- ❖ Major equipment manufacturers and suppliers
- ❖ Projected demand for equipment by region, 2018-2027 (by value and volume)

Part IV of the report provides a region-wise analysis of the six equipment segments and comprises the following sections:

- ❖ Existing transmission industry, 2017
- ❖ Key growth drivers
- ❖ Expected growth in the transmission industry, 2018-2027
- ❖ Expected demand for transmission equipment by segment, 2018-2027
 - Transmission towers
 - Conductors and cables
 - Insulators
 - Power transformers
 - Switchgears
 - Reactors

Part V analyses 20 key growth markets for the six equipment segments across the globe.

Part VI profiles key equipment manufacturers and suppliers by segment.

Part VII provides a region-wise analysis of the recent contracts and awards.

Part VIII comprises the appendix, containing a brief description of the six high voltage equipment, sources and methodology, and a list of acronyms.

The report is indispensable for any organisation interested in the global high voltage transmission equipment industry, equipment manufacturers and suppliers, EPC contractors, service and technology providers, investors/lenders, research organisations, industry consultants, utilities, system operators, regulatory agencies, development institutions, etc.

The report is available in PDF format. It is priced at USD5,500.

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- Overview
 - State of the transmission industry, 2017
 - Key growth drivers
 - Expected growth in the transmission industry, 2018-27
 - Expected demand for transmission equipment, 2018-27 (by value and volume)
- (Transmission towers, conductors and cables, insulators, power transformers, switchgears and reactors)

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Note: Key manufacturer profiles have:

- An overview
- Transmission product offerings
- Key manufacturing facilities
- Revenue trends
- Recent developments (new product launches, M&As, etc.)
- Other company details (employees, headquarters, etc.)
- Key contacts

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Sources and Methodology

Global Transmission Research's industry analysts have utilised various primary and secondary research sources in preparing this report. Primary sources include information obtained through questionnaires sent to various utilities, transmission companies, transmission system operators and equipment manufacturers. Several in-depth interviews were also conducted with high-ranking executives and experts from leading equipment suppliers, transmission utilities, transmission companies and with industry consultants. Our analysts and research associates also conducted extensive secondary research. These secondary sources include, but are not limited to: websites of utilities; annual reports and financial reports of utilities; investor presentations; analyst reports; government documents, plans and statistical databases; websites of relevant ministries and regulators; websites of relevant industry associations; internal and external proprietary databases; news articles; and press reports. Wherever applicable, all research sources are appropriately cited within this report.

These primary and secondary research sources, combined with our industry expertise, have been synthesised to prepare this report. For this report, we have tracked the power generation and transmission sectors of 100 countries across six regions, namely, North America, Latin America, Asia, Europe, the Middle East and Africa.

The methodology for estimating future transmission equipment demand was evolved after conducting several interviews with leading equipment manufacturers, transmission utilities, transmission companies, consultants and industry experts. In addition, detailed project reports of key transmission projects across the six regions were analysed to finalise the benchmarks/norms used to forecast equipment demand. The methodology and assumptions used to estimate the regional equipment demand have also been described in detail in the relevant sections of the report.

The estimated market size for each equipment represents the total revenue generated from expected sales of the respective equipment. The market size is calculated based on the estimated demand of the particular equipment multiplied with the average unit cost. Regional variations in average unit costs have been considered to estimate the regional market size for each equipment. For each equipment, the global market size is a summation of the market size of the six regions.

In certain charts or tables, sum may not add up to 100% due to rounding off error.

Great care has been taken to ensure that all analysis is well supported by facts. Where facts were not available and assumptions were made, we have explained our assumptions and our methods of estimation.

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Global Transmission Research is a leading provider of information and analysis on the global electricity transmission industry. We publish newsletters and reports. We also organise conferences on key issues and topical themes relevant to the transmission industry.

We publish the **Global Transmission Report** (a monthly newsletter) and **Global Transmission Weekly** (a weekly newsletter). We also operate the website www.globaltransmission.info. In addition, we have published several industry-focused research studies. Please visit our website to learn more about these products.

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