

GLOBAL ELECTRICITY TRANSMISSION EQUIPMENT MARKET REPORT 2020-29

Global Transmission Research has released the **fourth edition** of the **Global Electricity Transmission Equipment Market Report** in **August 2020**. The report is a comprehensive and up-to-date study of the global demand for high voltage electricity transmission equipment over the period 2020-2029. The report focuses on high voltage transmission equipment of 110 kV and above levels.

The report 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**. The impact of COVID has been analysed while making projections for equipment demand. Further, the report provides in-depth analysis of 20 key growth markets separately.

The report describes recent trends and developments in the six equipment segments in terms of product and technology, market, and pricing and costs. **The report also analyses the impact of COVID-19 on the equipment industry in the near-term, utilities' projects and plans, and manufacturers' business and supply chain.**

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, 2019
- 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, 2020-2029
- Key growth drivers for the transmission equipment industry
- Market forecast synopsis for transmission equipment, 2020-2029, in terms of both value and volume
- Snapshot of key growth markets
- Overview of key equipment manufacturers and suppliers, by equipment

Part III of the report analyses the impact of COVID-19

- The equipment industry in near term
- Utilities' projects and plans
- Manufacturers' business and supply chain

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

- Transmission towers
- Conductors and cables
- Insulators
- Power transformers
- Switchgears
- Reactors

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 USD5,000.

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, 2020-2030 (by value and volume)*

Part V of the report provides a region-wise analysis of the six equipment segments for the following six sections:

- North America
- Latin America
- Asia Pacific
- Europe
- Middle East
- Africa

Part VI analyses demand for the six equipment segments in 20 key growth countries.

Part VII profiles key equipment manufacturers and suppliers by segment.

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

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

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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.

These primary and secondary research sources, combined with our industry expertise, have been synthesised to prepare this report. Wherever applicable, all research sources are appropriately cited within this report.

For estimating the global numbers, we have adopted a bottom-up approach. Historical and future data for the 100 countries has been aggregated to reach the respective regional numbers, which in turn have been aggregated to calculate global numbers. Equipment demand projections are based on announced/proposed network development plans of leading transmission network developers and utilities in 100 countries across six regions, namely, North America, Latin America, Asia, Europe, the Middle East and Africa.

The countries included in these regions are:

- North America: US, Canada
- Latin America: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Peru, and Uruguay
- Asia Pacific: Afghanistan, Australia, Bangladesh, Bhutan, Cambodia, China, India, Indonesia, Japan, Kazakhstan, Malaysia, Myanmar, Nepal, New Zealand, Pakistan, Philippines, South Korea, Sri Lanka, Thailand, and Vietnam.
- Europe: Austria, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Macedonia, Montenegro, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, United Kingdom.
- Middle East: Bahrain, Jordan, Kuwait, Oman, Qatar, Saudi Arabia, and United Arab Emirates
- Africa: Algeria, Angola, Cameroon, Egypt, Ethiopia, Ghana, Ivory Coast, Kenya, Morocco, Mozambique, Namibia, Nigeria, Rwanda, South Africa, Sudan, Tanzania, Uganda, and Zambia.

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.

About the Publishers

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 crucial issues and topical themes relevant to the transmission industry. We publish the Global Transmission Report (a monthly newsletter) and the Global Transmission Weekly (a weekly update). We also operate the website www.globaltransmission.info. These products and services provide information on all the key developments, trends and issues in the sector. We have published several industry-focused research studies such as the Global Electricity Transmission Report, Global High Voltage Transmission Line Projects Report, Global Electricity Transmission Equipment Market Report, Global Electricity TSO Profiles Report, etc.

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