

# HIGH GROWTH TRANSMISSION MARKETS

## OPPORTUNITIES FOR SUPPLIERS, DEVELOPERS AND INVESTORS

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The electricity transmission industry world over is poised for growth. Rising demand for power, increasing integration of renewable energy resources and greater attention to grid reliability and security of supply are driving investments in transmission networks. Utilities are developing focused plans and governments are adopting regulatory and policy initiatives to stimulate investor interest. These industry and market forces are presenting sizeable business opportunities in the high voltage transmission sectors of both emerging and mature markets.

While opportunities exist, business leaders and investors are often faced with the tough challenge of which markets to focus on and where to invest. The recently released High Growth Transmission Markets report analyses the top 25 markets with high growth potential in electricity transmission. The report presents investment and network expansion plans for high voltage grid infrastructure in the top 25 markets, and highlights business opportunities for investors and developers (for private investment and public private partnerships), suppliers, contractors and consultants.

The report provides data on the growth over the last decade and analyses the recent developments shaping the future of these markets. It presents projections for the coming decade and highlights the broad outlook for these markets. It also presents a list of around 130 key upcoming (planned and proposed) transmission projects in these markets.

The report has eight distinct sections.

1. Introduction
2. Market analysis over the past decade
3. Industry dynamics and market forces
4. Emerging opportunities and prospects
5. Forecast and outlook
6. Expected or planned investment in transmission
7. Key projects
8. Market profiles (Top 25 countries)

Each market profile provides data and analysis on:

- Industry and regulatory structure
- Key transmission utilities/TSOs
- Recent developments and trends
- Emerging opportunities for developers and investors, for equipment suppliers, and for contractors and consultants
- Growth in generation capacity, production and consumption, 2008-17
- Expected demand and addition to generation capacity, 2018-27
- Expected growth in transmission network and capacity, 2018-27
  - Projections by voltage level (110 kV and above)
  - Projections by technology (AC and DC)
  - Projections by type of line (overhead, underground and undersea)
  - Projections for transformer capacity
- Expected investment in transmission network
- Expected demand for transmission equipment, 2018-27
  - Towers
  - Conductors and cables
  - Power transformers
  - Switchgear
- List of key projects
- Outlook

The report is priced at USD5,500.

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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 data and statistics obtained through email questionnaires sent to various utilities, transmission companies, transmission system operators and industry regulators. Extensive secondary research has been conducted by our analysts and research associates. 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 into qualitative and quantitative analysis which has been presented in this report.

The data and statistics for the years 2008 to 2017 are actual figures obtained from the concerned utilities and ministries. In a few cases, where data is not yet available, we have used estimates based on information obtained from press reports or those based on past growth trends. For expected addition to generation and transmission capacity, we have extensively researched the plan documents of various utilities and governments. Wherever these plans are not available, we have derived the projections based on past growth trends or based on new projects planned by the utilities.

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.

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 key issues and topical themes relevant to the transmission industry.

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