

**The Western European Market
for Distribution
Transformers**

2001 - 2005

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1. INTRODUCTION

1.1 OBJECTIVES AND SCOPE

The objective of this report is to provide a concise overview of the European market for Distribution Transformers. The report gives an estimate of the value of Distribution Transformer consumption in each national market, broken down by product type, end use and market shares of the major suppliers to the market. The data given are 1995-2000 market values and estimated 2001 to 2005 market values.

For the purposes of this report the Distribution Transformer market is defined as comprising transformers with a capacity greater than 16kVA and less than 11MVA, insulated with oil, other liquids, resin insulated and dry type transformers.

In other words, the report examines distribution transformers of all types. Values will not include application engineering, project management, installation or maintenance costs.

Within this report Distribution Transformers have been broken down into two categories :

- **Liquid filled** (capacity >16kVA and < 11MVA)
- **Dry Type** (Insulated with resin or air >16kVA and <11MVA)

The market sizes for Distribution Transformers is also broken down by end use, into the following categories:

- Utility
- Construction & Industry
- Transport
- Marine, Mining & Offshore
- Other

1.2 METHODOLOGY

Data in the markets report are presented in US dollars.

The survey was based primarily on desk research, including a review of available published production and trade statistics. Import and export figures are calculated from national and United Nations' figures for 1995-2000 - the most comprehensive and up-to-date statistics available. Market values are assumed to be equal to Production + (Imports - Exports). National production estimates are based on statistics provided by national governments and trade associations. They are also derived from an analysis of the size and location of known production plants. Market sizes for 2001 are estimated by analysing the pattern of market size growth over the period 1991-1998.

Market values are at factory gate prices - they reflect the prices for the products by the importer and do not include trade mark-ups and installation costs. It should be noted that published classifications of products, especially with respect to trade statistics, are sometimes inaccurate, as products may be shipped under generic titles. It should also be noted that Goulden Reports chronicles shipments rather than contracts. A contract to supply goods over a number of years will not appear as a one-off event in a Goulden Reports publication, but rather will be recorded from the trade statistics. The nature of the market means that demand within countries, especially developing ones, can fluctuate greatly from year to year as purchases are often made on a one-off basis rather than spread evenly over a number of years.

Within national markets, where published figures were unavailable to us, the breakdown between different product categories is based on intelligence based on the pattern of consumption in the country concerned. In these cases the breakdown is made from an estimate of the total market size rather than the value of the entire market being calculated from the individual product categories.

Figures for non-UN countries are based on data obtained from individual countries and are consequently not necessarily comparable with UN-derived information. Clearly the report is only as accurate as the information upon which it draws - the sources are regarded as being the best and most comprehensive available.

2. EUROPEAN SUMMARY

2.1 CURRENT EUROPEAN MARKET

The market for distribution transformers in each country in 2000 was estimated to be as follows:

Table 1

The European Market for Distribution Transformers 2000 (US\$ Thousands)

Country	Market 2000
Austria	
Belgium/Luxembourg	
Denmark	
Finland	
France	
Germany	
Greece	
Ireland	
Italy	
Netherlands	
Norway	
Portugal	
Spain	
Sweden	
Switzerland	
UK	
Total	

Source: Goulden Reports

The market by type of end customer in 2000 was estimated to be as follows:

Table 2

European Market for Distribution Transformers by Customer Type 2000 (US\$ Thousands)

Customer Type	Value of Purchases
Utility	
Construction & Industry	
Transport	
Mining, Marine & Offshore	
Other	
Total	

Source: Goulden Reports

The European market segmented by type of equipment in 2000 is estimated to be:

Table 3

European Market for Distribution Transformers by Equipment Type 2000 (US\$ Thousands)

Customer Type	Value of Purchases
Liquid filled	
Dry type	
Total	

Source: Goulden Reports

2.2 THE FUTURE EUROPEAN TRANSFORMER MARKET

The future market for distribution transformers is estimated as follows:

Table 4

The Future European Market for Distribution Transformers (US\$ Thousands)

Year	Value
2001	
2002	
2003	
2004	
2005	

Source: Goulden Reports