

**The World Market for
Low Voltage Protection
Components
2004**

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CONTENTS

1. INTRODUCTION.....	1
2. SUMMARY	3
2.1 SUMMARY MARKET TABLES	5
3. THE WORLD MARKET.....	11
4. THE WORLD'S MANUFACTURERS.....	15
4.1 CONTACT INFORMATION FOR LEADING MANUFACTURERS.....	19
5. REGIONAL MARKETS.....	23
5.1 WESTERN EUROPE	23
5.2 EASTERN EUROPE	27
5.3 FORMER USSR	31
5.4 NORTH AFRICA	35
5.5 WEST AFRICA	37
5.6 CENTRAL AFRICA.....	41
5.7 EAST AFRICA.....	43
5.8 SOUTHERN AFRICA.....	47
5.9 MIDDLE EAST	51
5.10 SOUTH ASIA	55
5.11 FAR EAST.....	57
5.12 SOUTH AMERICA.....	61
5.13 CENTRAL AMERICA & CARIBBEAN.....	65
5.14 NORTH AMERICA.....	69
5.15 OCEANIA.....	71
6. PRODUCTION	73
7. TRADE ANALYSIS	75
7.1 TOP 25 EXPORTERS	75
7.2 TOP 25 IMPORTERS.....	79
7.3 EXPORT VALUES	83
7.4 EXPORT PERCENTAGES	89
7.5 IMPORT VALUES.....	95
7.6 IMPORT PERCENTAGES	101
7.6.1 <i>Western Europe</i>	101
7.6.2 <i>Eastern Europe</i>	107
7.6.3 <i>Former USSR</i>	111
7.6.4 <i>Africa</i>	115
7.6.5 <i>Middle East</i>	121
7.6.6 <i>South Asia</i>	125
7.6.7 <i>Far East</i>	127
7.6.8 <i>South America</i>	131
7.6.9 <i>Central America & Caribbean</i>	135
7.6.10 <i>North America</i>	139
7.6.11 <i>Oceania</i>	141
8. APPENDICES	143
8.1 BACKGROUND COUNTRY INFORMATION.....	143

8.1.1	Europe.....	143
8.1.2	Africa.....	145
8.1.3	Asia	147
8.1.4	South America.....	149
8.1.5	North and Central America and Caribbean.....	150
8.1.6	Oceania	152
8.2	EXCHANGE RATES	153

TABLE OF TABLES

1. INTRODUCTION.....	1
2. SUMMARY	3
2.1 SUMMARY MARKET TABLES	5
The Fastest Growing National Markets for Low Voltage Protection Components 1998 - 2004 (US\$ Million).....	5
The Fastest Growing National Markets for Low Voltage Protection Components 2001 - 2004 (US\$ Million).....	6
The Fastest Declining National Markets for Low Voltage Protection Components 1998 - 2004 (US\$ Million).....	7
The Fastest Declining National Markets for Low Voltage Protection Components 2001 - 2004 (US\$ Million).....	8
The Largest National Markets for Low Voltage Protection Components, 2004 (US\$ Million)	9
3. THE WORLD MARKET.....	11
The World Market for Low Voltage Protection Components, by Region, 1999 – 2004 (US\$ Million)	11
The World Market for Low Voltage Protection Components, by Region, 1999 – 2004 (%).....	12
The World Market for Low Voltage Protection Components, by Product, 2003 (US\$ Million).....	13
4. THE WORLD'S MANUFACTURERS.....	15
Leading Manufacturers' Sales of Low Voltage Components 2003 (US\$ Million).....	15
Leading Manufacturers' Sales of Low Voltage Components, by Region 2003 (US\$ Million).....	16
Leading Manufacturers' Sales of Low Voltage Components, by Region 2003 (US\$ Million) - continued.....	17
4.1 CONTACT INFORMATION FOR LEADING MANUFACTURERS.....	19
5. REGIONAL MARKETS.....	23
5.1 WESTERN EUROPE	23
Western Europe: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million).....	23
Western Europe: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change)	24
Western Europe: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	25
5.2 EASTERN EUROPE	27
Eastern Europe: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million).....	27
Eastern Europe: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change).....	28
Eastern Europe: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	29
5.3 FORMER USSR	31
Former USSR: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million).....	31
Former USSR: The Market for Low Voltage Protection Components, by Country, 1996 - 2001 (% Change)	32
Former USSR: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	33
5.4 NORTH AFRICA	35
North Africa: The Market for Low Voltage Protection Components, by Country, 1996 - 2001 (US\$ Million).....	35
North Africa: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change).....	35
North Africa: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	36
5.5 WEST AFRICA	37
West Africa: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million).....	37
West Africa: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change).....	38
West Africa: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	39
5.6 CENTRAL AFRICA.....	41
Central Africa: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million).....	41
Central Africa: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change).....	41
Central Africa: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	42
5.7 EAST AFRICA.....	43
East Africa: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million)	43
East Africa: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change).....	44
East Africa: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	45

5.8	SOUTHERN AFRICA	47
	Southern Africa: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million).....	47
	Southern Africa: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change)	48
	Southern Africa: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	49
5.9	MIDDLE EAST	51
	Middle East: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million).....	51
	Middle East: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change).....	52
	Middle East: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	53
5.10	SOUTH ASIA	55
	South Asia: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million).....	55
	South Asia: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change)	55
	South Asia: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million).....	56
5.11	FAR EAST	57
	Far East: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million)	57
	Far East: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change).....	58
	Far East: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million).....	59
5.12	SOUTH AMERICA	61
	South America: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million).....	61
	South America: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change).....	62
	South America: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	63
5.13	CENTRAL AMERICA & CARIBBEAN	65
	Central America & Caribbean: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million)	65
	Central America & Caribbean: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change).....	66
	Central America & Caribbean: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	67
5.14	NORTH AMERICA	69
	North America: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million).....	69
	North America: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change).....	69
	North America: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million)	70
5.15	OCEANIA	71
	Oceania: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (US\$ Million)	71
	Oceania: The Market for Low Voltage Protection Components, by Country, 1999 - 2004 (% Change).....	71
	Oceania: The Market for Low Voltage Protection Components, by Country, by Component 1999 - 2004 (US\$ Million).....	72
6.	PRODUCTION	73
	The Top 25 Producers of Low Voltage Protection Components, 2003 (US\$ Million).....	73
7.	TRADE ANALYSIS	75
7.1	TOP 25 EXPORTERS	75
	The Top 25 Exporters of Automatic Circuit Breakers, 2002 (US\$ Thousands)	75
	The Top 25 Exporters of Fuses, 2002 (US\$ Thousands).....	76
	The Top 25 Exporters of Other Low Voltage Protection Apparatus, 2002 (US\$ Thousands).....	77
	The Top 25 Exporters of Low Voltage Protection Components, 2002 (US\$ Thousands)	78
7.2	TOP 25 IMPORTERS	79
	The Top 25 Importers of Automatic Circuit Breakers, 2002 (US\$ Thousands)	79
	The Top 25 Importers of Fuses, 2002 (US\$ Thousands).....	80
	The Top 25 Importers of Other Low Voltage Protection Apparatus, 2002 (US\$ Thousands).....	81
	The Top 25 Importers of Low Voltage Protection Components, 2002 (US\$ Thousands)	82
7.3	EXPORT VALUES	83
	The Top 25 Exporters of Low Voltage Protection Components to Principal Destinations, Austria - China, 2002 (US\$ Thousand)	83
	The Top 25 Exporters of Low Voltage Protection Components to Principal Destinations, China HK SAR - Germany, 2002 (US\$ Thousand).....	84
	The Top 25 Exporters of Low Voltage Protection Components to Principal Destinations, Hungary - Malaysia, 2002 (US\$ Thousand)	85

	The Top 25 Exporters of Low Voltage Protection Components to Principal Destinations, Mexico – Singapore, 2002 (US\$ Thousand).....	86
	The Top 25 Exporters of Low Voltage Protection Components to Principal Destinations, Spain - USA,2002 (US\$ Thousand).....	87
7.4	EXPORT PERCENTAGES	89
	The Top 25 Exporters of Low Voltage Protection Components to Principal Destinations, Austria - China, 2002 (%).....	89
	The Top 25 Exporters of Low Voltage Protection Components to Principal Destinations, China HK SAR - Germany, 2002 (%)	90
	The Top 25 Exporters of Low Voltage Protection Components to Principal Destinations, Hungary - Malaysia, 2002(%)	91
	The Top 25 Exporters of Low Voltage Protection Components to Principal Destinations, Mexico – Singapore, 2002 (%)	92
	The Top 25 Exporters of Low Voltage Protection Components to Principal Destinations, Spain - USA, 2002 (%)...93	93
7.5	IMPORT VALUES	95
	The Top 25 Importers of Low Voltage Protection Components from Principal Sources, Australia - Canada, 2002 (US\$ Thousand).....	95
	The Top 25 Importers of Low Voltage Protection Components from Principal Sources, China - Hong Kong, 2002 (US\$ Thousand).....	96
	The Top 25 Importers of Low Voltage Protection Components from Principal Sources, Hungary - Malaysia, 2002 (US\$ Thousand)	97
	The Top 25 Importers of Low Voltage Protection Components from Principal Sources, Mexico - Singapore, 2002 (US\$ Thousand).....	98
	The Top 25 Importers of Low Voltage Protection Components from Principal Sources, Spain - USA, 2002 (US\$ Thousand).....	99
7.6	IMPORT PERCENTAGES	101
7.6.1	<i>Western Europe</i>	101
	Western Europe: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Austria - Denmark, (%)	101
	Western Europe: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Finland - Greece, (%).....	102
	Western Europe: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Austria - France, (%).....	103
	Western Europe: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Norway - Sweden, (%)	104
	Western Europe: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Austria - France, (%)	105
7.6.2	<i>Eastern Europe</i>	107
	Eastern Europe: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Bulgaria – Czech Rep., (%)	107
	Eastern Europe: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Hungary - Romania, (%).....	108
	Eastern Europe: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Serbia & Mont. - Slovenia, (%)	109
7.6.3	<i>Former USSR</i>	111
	Former USSR: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Azerbaijan - Estonia, (%)	111
	Former USSR: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Latvia - Moldova, (%).....	112
	Former USSR: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Russia - Georgia, (%)	113
7.6.4	<i>Africa</i>	115
	Africa: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Algeria – Cote d'Ivoire, (%)	115
	Africa: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Cameroon – Ethiopia, (%)	116
	Africa: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Kenya - Morocco, (%).....	117
	Africa: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Nigeria – South Africa, (%).....	118
	Africa: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Tunisia - Zimbabwe, (%).....	119
7.6.5	<i>Middle East</i>	121
	Middle East: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Bahrain - Israel, (%).....	121

	Middle East: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Jordan - Lebanon, (%).....	122
	Middle East: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Oman - Saudi Arabia, (%).....	123
	Middle East: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Syria - UAE, (%).....	124
7.6.6	<i>South Asia</i>	125
	South Asia: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Afghanistan - India, (%).....	125
	South Asia: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Nepal - Sri Lanka, (%).....	126
7.6.7	<i>Far East</i>	127
	Far East: Imports of Low Voltage Protection Components, by Country, from Principal Sources, China - Indonesia, (%).....	127
	Far East: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Japan - Malaysia, (%).....	128
	Far East: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Philippines - Vietnam, (%).....	129
7.6.8	<i>South America</i>	131
	South America: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Argentina - Chile, (%).....	131
	South America: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Colombia - Paraguay, (%).....	132
	South America: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Peru - Venezuela, (%).....	133
7.6.9	<i>Central America & Caribbean</i>	135
	Central America: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Bahamas - Bermuda, (%).....	135
	Central America: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Costa Rica - Dominican Republic, (%).....	135
	Central America: Imports of Low Voltage Protection Components, by Country, from Principal Sources, El Salvador - Haiti, (%).....	136
	Central America: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Honduras - Nicaragua, (%).....	136
	Central America: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Honduras - Trinidad & Tobago, (%).....	137
7.6.10	<i>North America</i>	139
	North America: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Canada - USA, (%).....	139
7.6.11	<i>Oceania</i>	141
	Oceania: Imports of Low Voltage Protection Components, by Country, from Principal Sources, Australia - New Zealand, (%).....	141
8.	APPENDICES	143
8.1	BACKGROUND COUNTRY INFORMATION	143
8.1.1	<i>Europe</i>	143
	Europe: Basic Demographics and Power Loading, by Country.....	143
	Europe: Basic Demographics and Power Loading, by Country - continued.....	144
8.1.2	<i>Africa</i>	145
	Africa: Basic Demographics and Power Loading, by Country.....	145
	Africa: Basic Demographics and Power Loading, by Country - continued.....	146
8.1.3	<i>Asia</i>	147
	Asia: Basic Demographics and Power Loading, by Country.....	147
	Asia: Basic Demographics and Power Loading, by Country - continued.....	148
8.1.4	<i>South America</i>	149
	South America: Basic Demographics and Power Loading, by Country.....	149
8.1.5	<i>North and Central America and Caribbean</i>	150
	North & Central America & Caribbean: Basic Demographics and Power Loading, by Country.....	150
	North & Central America & Caribbean: Basic Demographics and Power Loading, by Country - continued.....	151
8.1.6	<i>Oceania</i>	152
	Oceania: Basic Demographics and Power Loading, by Country.....	152
8.2	EXCHANGE RATES	153
	Exchange Rates for Major Currencies against US Dollar 1997-2002.....	153

1. INTRODUCTION

The objective of this report is to provide a concise view of the world market for Low Voltage Protection Components. The report gives an estimate of the value of consumption in each national market. The figures represent market values (consumption) for 1999-2002 based on the latest data available, and forecasts for 2003 and 2004. Trade data are given for the latest available year, 2002.

For the purpose of this report, Low Voltage Protection Components are defined as follows :-

- **Automatic Circuit Breakers ($\leq 63\text{A}$, $\leq 1,000\text{V}$)**

Comprising Miniature Circuit Breakers (MCB's); Residual Circuit Devices (RCD's); Moulded Case Circuit Breakers (MCCB's); Air Circuit Breakers (ACB's) and Oil Circuit Breakers (OCB's) less than or equal to 63 amps.

- **Automatic Circuit Breakers ($> 63\text{A}$, $\leq 1,000\text{V}$)**

Comprising Miniature Circuit Breakers (MCB's); Residual Circuit Devices (RCD's); Moulded Case Circuit Breakers (MCCB's); Air Circuit Breakers (ACB's) and Oil Circuit Breakers (OCB's) more than 63 amps, less than 1000V.

- **Fuses ($\leq 63\text{A}$, $\leq 1,000\text{V}$)**

Comprising semi-enclosed, rewirable and cartridge type fuses, and fuseholders less than or equal to 63 amps.

- **Fuses ($> 63\text{A}$, $\leq 1,000\text{V}$)**

Comprising semi-enclosed, rewirable and cartridge type fuses, and fuseholders more than 63 amps, less than 1000V.

- **'Other' Circuit Protection ($\leq 1,000\text{V}$)**

Comprising combined switch-fuse units and combined RCD-socket units.

This report has two sister publications - '**The World Market for Low Voltage Connection Components, 2001**', which gives similar information on the world's low voltage connection component market, and '**Directory of Low Voltage Component Manufacturers, 2001**' which provides contact details for all manufacturers of these products throughout the world. Two complementary reports, '**The World Market for Distribution and Control Panels, 2001**' and '**Directory of Distribution and Control Panels Manufacturers, 2001**', are also available.

The scope of this report is global - that is, every country having a significant Low Voltage Protection Component customer base. The report is designed to be used as a first line planning tool by companies interested in the global market for Low Voltage Protection Components and as a screen to identify national markets worthy of further investigation.

2. SUMMARY

- The global market for Low Voltage Protection Components was valued at US\$12,338.1 million in 2003.
- The largest national market in 2004 is that of the USA, which was valued at \$2,983.2 million and which accounts for 23.3% of the overall world market.
- The second largest national market was that of Japan (US\$1,119 million) followed by the UK (US\$1,026 million) and France (US\$874 million).
- The largest regional market for Low Voltage Protection Components in 2004 is Western Europe (US\$4,335 million) followed by North America (US\$3,580 million) and the Far East (US\$2,566 million).
- World production of Low Voltage Protection Components was estimated at US\$12,453 million in 2003.
- The largest producer in 2003 was the USA, with production totalling US\$2,602 million.
- Reported exports of Low Voltage Protection Components totalled US\$4,989 million in 2002.
- The largest exporter in 2002 was the USA (US\$645 million) followed by France (US\$636 million) and Germany (US\$617 million).
- Reported imports of Low Voltage Protection Components in 2002 totalled US\$4,996 million.
- The largest importer in 2002 was the USA (US\$953 million) followed by Germany (US\$346 million) and Italy (US\$294 million)