

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

**© GOULDEN REPORTS
October 2004**

75 Updown Hill, Windlesham, Surrey GU20 6DS United Kingdom
Tel: +44 (0) 1276 474828 Fax: +44 (0) 1276 476746
E-mail: info@gouldenreports.org
Website: www.gouldenreports.org

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form, or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior permission of the copyright owner.

NOTE

The information given in this report has been compiled from published sources and interpreted from fieldwork based on informed opinions. Whilst every care has been taken in the preparation of the report, there may have been some errors in the information obtained. Although it is impossible to verify every single detail by cross checking, we believe the general picture provided is reasonably accurate and comprehensive.

Many Goulden Reports publications contain an overview of selected company financial information and capabilities based on published sources where available. Although the companies represented are believed to be the major suppliers the profiles are meant to be indicative rather than definitive.

It is fundamental to the philosophy of Goulden Reports to constantly seek to extend and improve our service to clients. In pursuit of these aims, we shall be pleased to consider all requests for regular or periodic updating of all or any part of the information contained in this report, or for extensions in coverage in terms of product areas, market sectors and/or geographic regions.

We are, of course, always happy to discuss with any subscriber the possibility of undertaking further work, whether arising out of this report or in different business areas.

MORE INFORMATION ON GOULDEN REPORTS

At the end of this report you will find a list of our latest published reports. Should you require more information on either our published reports or our private client services, please contact us at the address given.

Full details on all Goulden Reports published studies (including full tables of contents and tables of tables) and ad hoc research services can be found on our website:

www.gouldenreports.org

CONTENTS

1. INTRODUCTION.....	1
1.1 OBJECTIVES AND SCOPE	1
1.2 METHODOLOGY.....	3
2. SUMMARY	5
2.1 SUMMARY MARKET TABLES	7
3. THE WORLD MARKET.....	13
4. THE WORLD'S MANUFACTURERS.....	17
4.1 CONTACT INFORMATION FOR LEADING MANUFACTURERS.....	21
5. REGIONAL MARKETS.....	25
5.1 WESTERN EUROPE	25
5.2 EASTERN EUROPE	29
5.3 FORMER USSR	33
5.4 NORTH AFRICA	37
5.5 WEST AFRICA	39
5.6 CENTRAL AFRICA.....	43
5.7 EAST AFRICA.....	45
5.8 SOUTHERN AFRICA.....	49
5.9 MIDDLE EAST	51
5.10 SOUTH ASIA	55
5.11 FAR EAST.....	57
SOUTH AMERICA.....	61
5.12 CENTRAL AMERICA & CARIBBEAN.....	65
5.13 NORTH AMERICA.....	69
5.14 OCEANIA.....	71
6. PRODUCTION	73
7. TRADE ANALYSIS	75
7.1 TOP 25 EXPORTERS	75
7.2 TOP 25 IMPORTERS.....	81
7.3 EXPORT VALUES	87
7.4 EXPORT PERCENTAGES	97
7.5 IMPORT VALUES.....	107
7.6 IMPORT PERCENTAGES	117
7.6.1 <i>Western Europe</i>	117
7.6.2 <i>Eastern Europe</i>	125
7.6.3 <i>Former USSR</i>	129
7.6.4 <i>Africa</i>	135
7.6.5 <i>Middle East</i>	151
7.6.6 <i>South Asia</i>	157
7.6.7 <i>Far East</i>	161
7.6.8 <i>South America</i>	167
7.6.9 <i>Central America & Caribbean</i>	171
7.6.10 <i>North America</i>	179
7.6.11 <i>Oceania</i>	181

8.	APPENDICES	185
8.1	BACKGROUND COUNTRY INFORMATION.....	185
8.1.1	Europe.....	185
8.1.2	Africa.....	187
8.1.3	Asia	189
8.1.4	South America.....	191
8.1.5	North and Central America and Caribbean.....	192
8.1.6	Oceania.....	194
8.2	EXCHANGE RATES	195

TABLE OF TABLES

1. INTRODUCTION.....	1
1.1 OBJECTIVES AND SCOPE	1
1.2 METHODOLOGY.....	3
2. SUMMARY	5
2.1 SUMMARY MARKET TABLES	7
The Fastest Growing National Markets for Low Voltage Connection Components 1999 - 2004 (US\$ Million)	7
The Fastest Growing National Markets for Low Voltage Connection Components 2002 - 2004 (US\$ Million)	8
The Fastest Declining National Markets for Low Voltage Connection Components 1999 - 2004 (US\$ Million).....	9
The Fastest Declining National Markets for Low Voltage Connection Components 2002 - 2004 (US\$ Million).....	10
The Largest National Markets for Low Voltage Connection Components 2004 (US\$ Million)	11
3. THE WORLD MARKET.....	13
The World Market for Low Voltage Connection Components, by Region, 1999 – 2004 (US\$ Million)	13
The World Market for Low Voltage Connection Components, by Region, 1999 – 2004 (%).....	14
The World Market for Low Voltage Connection Components, by Region, by Component 2004 (US\$ Million).....	15
4. THE WORLD'S MANUFACTURERS.....	17
Leading Manufacturers' Sales of Low Voltage Components 2003 (US\$ Million).....	17
Leading Manufacturers' Sales of Low Voltage Components, by Region 2003 (US\$ Million).....	18
Leading Manufacturers' Sales of Low Voltage Components, by Region 2003 (US\$ Million) - continued.....	19
4.1 CONTACT INFORMATION FOR LEADING MANUFACTURERS.....	21
5. REGIONAL MARKETS.....	25
5.1 WESTERN EUROPE	25
Western Europe: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million).....	25
Western Europe: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	26
Western Europe: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	27
5.2 EASTERN EUROPE	29
Eastern Europe: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million).....	29
Eastern Europe: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	30
Eastern Europe: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	31
5.3 FORMER USSR	33
Former USSR: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million).....	33
Former USSR: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change)	34
Former USSR: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	35
5.4 NORTH AFRICA	37
North Africa: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million).....	37
North Africa: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	37
North Africa: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	38
5.5 WEST AFRICA	39
West Africa: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million)	39
West Africa: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	40
West Africa: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	41
5.6 CENTRAL AFRICA.....	43
Central Africa: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million).....	43
Central Africa: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	43
Central Africa: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	44
5.7 EAST AFRICA.....	45
East Africa: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million)	45
East Africa: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	46

	East Africa: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	47
5.8	SOUTHERN AFRICA	49
	Southern Africa: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million)....	49
	Southern Africa: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	49
	Southern Africa: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	50
5.9	MIDDLE EAST	51
	Middle East: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million)	51
	Middle East: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	52
	Middle East: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	53
5.10	SOUTH ASIA	55
	South Asia: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million).....	55
	South Asia: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change)	55
	South Asia: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	56
5.11	FAR EAST	57
	Far East: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million)	57
	Far East: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	58
	South Asia: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	59
	SOUTH AMERICA	61
	South America: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million).....	61
	South America: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	62
	South America: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	63
5.12	CENTRAL AMERICA & CARIBBEAN	65
	Central America & Caribbean: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million)	65
	Central America & Caribbean: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	66
	Central America & Caribbean: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	67
5.13	NORTH AMERICA	69
	North America: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million).....	69
	North America: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	69
	North America: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	70
5.14	OCEANIA	71
	Oceania: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (US\$ Million)	71
	Oceania: The Market for Low Voltage Connection Components, by Country, 1999 - 2004 (% Change).....	71
	Oceania: The Market for Low Voltage Connection Components, by Country, by Component, 2004 (US\$ Million).....	72
6.	PRODUCTION	73
	The Top 25 Producers of Low Voltage Connection Components, 2003 (US\$ Million).....	73
7.	TRADE ANALYSIS	75
7.1	TOP 25 EXPORTERS	75
	The Top 25 Exporters of Lamp Holders, 2002 (US\$ Thousands)	75
	The Top 25 Exporters of Plugs and Sockets, 2002 (US\$ Thousands)	76
	The Top 25 Exporters of Switches, 2002 (US\$ Thousands).....	77
	The Top 25 Exporters of Relays, 2002 (US\$ Thousands)	78
	The Top 25 Exporters of Other Low Voltage Connection Apparatus, 2002 (US\$ Thousands).....	79
	The Top 25 Exporters of Low Voltage Connection Components, 2002 (US\$ Thousands)	80
7.2	TOP 25 IMPORTERS	81
	The Top 25 Importers of Lamp Holders, 2002 (US\$ Thousands)	81
	The Top 25 Importers of Plugs and Sockets, 2002 (US\$ Thousands)	82
	The Top 25 Importers of Switches, 2002 (US\$ Thousands).....	83
	The Top 25 Importers of Relays, 2002 (US\$ Thousands)	84
	The Top 25 Importers of Other Low Voltage Connection Apparatus, 2002 (US\$ Thousands).....	85
	The Top 25 Importers of Low Voltage Connection Components, 2002 (US\$ Thousands)	86
7.3	EXPORT VALUES	87

	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, Austria - Canada, 2002 (US\$ Thousand).....	87
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, China – Czech Rep., 2002 (US\$ Thousand)	88
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, France - Hungary, 2002 (US\$ Thousand).....	89
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, Indonesia - Italy, 2002 (US\$ Thousand)	90
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, Japan - Mexico, 2002 (US\$ Thousand).....	91
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, Netherlands - Poland, 2002 (US\$ Thousand).....	92
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, S Korea - Spain, 2002 (US\$ Thousand).....	93
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, Sweden - UK, 2002 (US\$ Thousand).....	94
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, USA + Possible Taiwan, 2002 (US\$ Thousand).....	95
7.4	EXPORT PERCENTAGES	97
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, Austria - Canada, 2002 (%).....	97
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, China – Czech Rep., 2002 (%).....	98
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, France - Hungary, 2002 (%)	99
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, Indonesia - Italy, 2002 (%).....	100
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, Japan - Mexico, 2002 (%).....	101
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, Netherlands - Poland, 2002 (%)	102
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, S Korea - Spain, 2002 (%).....	103
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, Sweden - UK, 2002 (%)	104
	The Top 25 Exporters of Low Voltage Connection Components to Principal Destinations, USA + Possible Taiwan, 2002 (%).....	105
7.5	IMPORT VALUES	107
	The Top 25 Importers of Low Voltage Connection Components to Principal Destinations, Australia - Belgium, 2002 (US\$ Thousand).....	107
	The Top 25 Importers of Low Voltage Connection Components to Principal Destinations, Brazil – China, 2002 (US\$ Thousand)	108
	The Top 25 Importers of Low Voltage Connection Components to Principal Destinations, Hong Kong - France, 2002 (US\$ Thousand).....	109
	The Top 25 Importers of Low Voltage Connection Components to Principal Destinations, Germany - Italy, 2002 (US\$ Thousand)	110
	The Top 25 Importers of Low Voltage Connection Components to Principal Destinations, Japan - Mexico, 2002 (US\$ Thousand).....	111
	The Top 25 Importers of Low Voltage Connection Components to Principal Destinations, Netherlands - Portugal, 2002 (US\$ Thousand).....	112
	The Top 25 Importers of Low Voltage Connection Components to Principal Destinations, S Korea - Spain, 2002 (US\$ Thousand).....	113
	The Top 25 Importers of Low Voltage Connection Components to Principal Destinations, Sweden - UK, 2002 (US\$ Thousand).....	114
	The Top 25 Importers of Low Voltage Connection Components to Principal Destinations, USA, 2002 (US\$ Thousand).....	115
7.6	IMPORT PERCENTAGES	117
7.6.1	<i>Western Europe</i>	117
	Western Europe: Imports of L.V. Connection Components, by Country.,	117
	Austria - Cyprus, 2002 (%).....	117
	Western Europe: Imports of L.V. Connection Components, by Country.,	118
	Denmark - France, 2002 (%)	118
	Western Europe: Imports of L.V. Connection Components, by Country.,	119
	Germany - Iceland, 2002 (%)	119
	Western Europe: Imports of L.V. Connection Components, by Country.,	120
	Ireland - Malta, 2002 (%)	120

	Western Europe: Imports of L.V. Connection Components, by Country,	121
	Netherlands - Portugal, 2002 (%)	121
	Western Europe: Imports of L.V. Connection Components, by Country,	122
	Spain - Sweden, 2002 (%)	122
	Western Europe: Imports of L.V. Connection Components, by Country,	123
	Switzerland - UK, 2002 (%)	123
7.6.2	<i>Eastern Europe</i>	125
	Eastern Europe: Imports of L.V. Connection Components, by Country,	125
	Albania - Bulgaria, 2002 (%)	125
	Eastern Europe: Imports of L.V. Connection Components, by Country,	126
	Croatia - Hungary, 2002 (%)	126
	Eastern Europe: Imports of L.V. Connection Components, by Country,	127
	Poland – Serb/Mont., 2002 (%)	127
	Eastern Europe: Imports of L.V. Connection Components, by Country,	128
	Slovakia - Yugoslavia, 2002 (%)	128
7.6.3	<i>Former USSR</i>	129
	Former Soviet Union: Imports of L.V. Connection Components, by Country,	129
	Armenia - Belarus, 2002 (%)	129
	Former Soviet Union: Imports of L.V. Connection Components, by Country,	130
	Estonia - Kazakhstan, 2002 (%)	130
	Former Soviet Union: Imports of L.V. Connection Components, by Country,	131
	Latvia - Moldova, 2002 (%)	131
	Former Soviet Union: Imports of L.V. Connection Components, by Country,	132
	Russia – Turkmenistan, 2002 (%)	132
	Former Soviet Union: Imports of L.V. Connection Components, by Country,	133
	Ukraine – Uzbekistan, 2002 (%)	133
7.6.4	<i>Africa</i>	135
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Algeria - Benin, 2002 (%)	135
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Botswana - Burundi, 2002 (%)	136
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Cameroon – Central African Republic, 2002 (%)	137
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Chad - Congo, 2002 (%)	138
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Congo Democratic. Rep. - Djibouti, 2002 (%)	139
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Egypt - Ethiopia, 2002 (%)	140
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Gabon - Ghana, 2002 (%)	141
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Guinea - Kenya, 2002 (%)	142
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Libya - Malawi, 2002 (%)	143
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Mali - Mauritius, 2002 (%)	144
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Morocco - Niger, 2002 (%)	145
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Nigeria – Sierra Leone, 2002 (%)	146
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, South Africa - Tanzania, 2002 (%)	147
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Togo - Uganda, 2002 (%)	148
	Africa: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Zambia - Zimbabwe, 2002 (%)	149
7.6.5	<i>Middle East</i>	151
	Middle East: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Bahrain - Iraq, 2002 (%)	151
	Middle East: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Israel - Kuwait, 2002 (%)	152
	Middle East: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Lebanon - Qatar, 2002 (%)	153
	Middle East: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Saudi Arabia - Turkey, 2002 (%)	154

	Middle East: Imports of Low Voltage Connection Components, by Country, from Principal Sources, UAE - Yemen, 2002 (%).....	155
7.6.6	<i>South Asia</i>	157
	South Asia: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Afghanistan - Bhutan, 2002 (%).....	157
	South Asia: Imports of Low Voltage Connection Components, by Country, from Principal Sources, India - Nepal, 2002 (%).....	158
	South Asia: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Pakistan - Sri Lanka, 2002 (%).....	159
7.6.7	<i>Far East</i>	161
	Far East: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Brunei Darussalam - China, 2002 (%).....	161
	Far East: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Hong Kong SAR - Japan, 2002 (%).....	162
	Far East: Imports of Low Voltage Connection Components, by Country, from Principal Sources, North Korea - Laos, 2002 (%).....	163
	Far East: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Macau - Mongolia, 2002 (%).....	164
	Far East: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Myanmar - Singapore, 2002 (%).....	165
	Far East: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Taiwan - Vietnam, 2002 (%).....	166
7.6.8	<i>South America</i>	167
	South America: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Argentina - Brazil, 2002 (%).....	167
	South America: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Chile - Ecuador, 2002 (%).....	168
	South America: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Paraguay - Suriname, 2002 (%).....	169
	South America: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Uruguay - Venezuela, 2002 (%).....	170
7.6.9	<i>Central America & Caribbean</i>	171
	Cent. America & Caribbean: Imports of L.V. Connection Components, by Country, from Principal Sources, 171	171
	Antigua & Barbuda - Bahamas, 2002 (%).....	171
	Cent. America & Caribbean: Imports of L.V. Connection Components, by Country, from Principal Sources, 172	172
	Barbados - Costa Rica, 2002 (%).....	172
	Cent. America & Caribbean: Imports of L.V. Connection Components, by Country, from Principal Sources, 173	173
	Cuba - Dominican Rep., 2002 (%).....	173
	Cent. America & Caribbean: Imports of L.V. Connection Components, by Country, from Principal Sources, 174	174
	El Salvador - Guatemala, 2002 (%).....	174
	Cent. America & Caribbean: Imports of L.V. Connection Components, by Country, from Principal Sources, 175	175
	Haiti - Jamaica, 2002 (%).....	175
	Cent. America & Caribbean: Imports of L.V. Connection Components, by Country, from Principal Sources, 176	176
	Netherlands Antilles - Panama, 2002 (%).....	176
	Cent. America & Caribbean: Imports of L.V. Connection Components, by Country, from Principal Sources, 177	177
	Saint Lucia - Trinidad & Tobago, 2002 (%).....	177
7.6.10	<i>North America</i>	179
	North America: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Canada - USA, 2002 (%).....	179
7.6.11	<i>Oceania</i>	181
	Oceania: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Australia - French Polynesia, 2002 (%).....	181
	Oceania: Imports of Low Voltage Connection Components, by Country, from Principal Sources, New Caledonia - Papua New Guinea, 2002 (%).....	182
	Oceania: Imports of Low Voltage Connection Components, by Country, from Principal Sources, Samoa - Vanuatu, 2002 (%).....	183
8.	APPENDICES	185
8.1	BACKGROUND COUNTRY INFORMATION	185
8.1.1	<i>Europe</i>	185
	Europe: Basic Demographics and Power Loading, by Country.....	185
	Europe: Basic Demographics and Power Loading, by Country - continued.....	186
8.1.2	<i>Africa</i>	187
	Africa: Basic Demographics and Power Loading, by Country.....	187
	Africa: Basic Demographics and Power Loading, by Country - continued.....	188

8.1.3	<i>Asia</i>	189
	Asia: Basic Demographics and Power Loading, by Country	189
	Asia: Basic Demographics and Power Loading, by Country - continued	190
8.1.4	<i>South America</i>	191
	South America: Basic Demographics and Power Loading, by Country	191
8.1.5	<i>North and Central America and Caribbean</i>	192
	North & Central America & Caribbean: Basic Demographics and Power Loading, by Country	192
	North & Central America & Caribbean: Basic Demographics and Power Loading, by Country - continued.....	193
8.1.6	<i>Oceania</i>	194
	Oceania: Basic Demographics and Power Loading, by Country	194
8.2	EXCHANGE RATES	195
	Exchange Rates for Major Currencies against US Dollar 1997-2002.....	195

1. INTRODUCTION

1.1 OBJECTIVES AND SCOPE

The objective of this report is to provide a concise view of the world market for Low Voltage Connection 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 Connection Components are defined as follows :-

- **Relays**

Relays (including contactors) for a voltage not exceeding 1000V

- **Switches >60V**

Comprising lighting, cooker, isolating and safety switches; separate switch units for incorporation into sockets etc. (rocker, rotary, push-button, toggle and knife) for domestic and industrial applications of single and three phase, rated up to 1,000V.

- **Plugs and Sockets**

Including panel and surface mounting sockets, in-line connectors, switched sockets and plugs for connection to coaxial cable for domestic and industrial applications of single and three phase, rated up to 1,000V.

- **Lampholders**

Including Edison screw and bayonet type, ceiling rose, pendant, batten and base fitting for domestic and industrial applications, rated up to 250V.

- **Other Connection Devices**

Including contacts; junction boxes, mounting boxes and connector blocks for domestic and industrial applications, rated up to 1,000V.

This report has two sister publications - '**The World Market for Low Voltage Protection Components 2004**', which gives similar information on the world's low voltage protection component market, and '**Directory of Manufacturers of Low Voltage Connection and Protection Components 2004**' which provides contact details for all manufacturers of these products throughout the world, and includes product details for each company where available. Two complementary reports, '**The World Market for Distribution and Control Panels 2004**' and '**Directory of Manufacturers of Distribution and Control Panels 2004**', are also available.

The scope of this report is global - that is, every country having a significant Low Voltage Connection 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 Connection Components and as a screen to identify national markets worthy of further investigation.

1.2 METHODOLOGY

Data in the Market 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 1998 to 2002 - 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 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 Report, 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 uses 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.

Data in this report will vary from those printed in previous issues. These differences are due principally to improvements in the quality of official data sources in addition to the fact that significantly more data is available now than was previously the case.

Columns may not always add to the absolute totals given in the tables - this is due to rounding.

2. SUMMARY

- The global market for Low Voltage Connection Components is estimated to be valued at US\$43,396 million in 2004.
- The largest national market in 2004 is estimated to be that of the USA, which was valued at US\$7,676 million and which accounted for over 17% of the overall world market.
- The second largest national market is that of China (US\$4,674 million) followed by Germany (US\$3,614 million).
- The largest regional market for Low Voltage Connection Components in 2004 is Western Europe (US\$15,814 million) followed by North America (US\$10,936 million) and the Far East (US\$9,110 million).
- World production of Low Voltage Connection Components was estimated at US\$43,065 million in 2003.
- The largest producer in 2003 was the USA, with production totalling US\$7,239 million.
- Reported exports of Low Voltage Connection Components totalled US\$30,343 million in 2002.
- The largest exporter in 2002 was Germany (US\$4,606 million) followed by the USA (US\$4,586 million) and Japan (US\$3,587 million).
- Reported imports of Low Voltage Connection Components in 2003 totalled US\$31,755 million.
- The largest importer was the USA (US\$4,165 million) followed by Mexico (US\$3,328 million) and Germany (US\$2,694 million)