

Global Overview
of the
Wiring Devices Market
Markets and Manufacturers
2003

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1. INTRODUCTION

The objective of this report is to provide a concise view of the world market for Low Voltage Electrical Wiring Accessories. The report gives an estimate of the value of consumption in each national market. The figures represent market values (consumption) for 1996-1999 based on the latest data available, and forecasts for 2000 and 2001. Trade data are given for the latest available year, 1999.

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.

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 $> 60\text{V}$

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.

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

1.1 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 1991 to 1999 - 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

2.1 Protection Equipment

- The global market for Low Voltage Protection Components was valued at US\$11,472 million in 2001.
- The largest national market in 2001 was that of the USA, which was valued at US\$2,648 million and which accounted for over 23% of the overall world market.
- The second largest national market was that of Japan (US\$980 million) followed by the UK (US\$953 million) and France (US\$774 million).
- The largest regional market for Low Voltage Protection Components in 2001 was Western Europe (US\$3,988 million) followed by North America (US\$3,163 million) and the Far East (US\$2,219 million).
- World production of Low Voltage Protection Components was estimated at US\$10,277 million in 2000.
- The largest producer in 2000 was the USA, with production totalling US\$2,016 million.
- Reported exports of Low Voltage Protection Components totalled US\$4,308 million in 1999.
- The largest exporter in 1999 was Germany (US\$628 million) followed by France (US\$621 million) and the USA (US\$521 million).
- Reported imports of Low Voltage Protection Components in 1999 totalled US\$4,721 million.
- The largest importer was the USA (US\$923 million) followed by Italy (US\$303 million) and France (US\$265 million)

2.2 Connection Components

- The global market for Low Voltage Connection Components was valued at US\$40,723 million in 2001.
- The largest national market in 2001 was that of the USA, which was valued at US\$6,942 million and which accounted for over 17% of the overall world market.
- The second largest national market was that of Germany (US\$4,476 million) followed by China (US\$3,248 million) and the UK (US\$2,998 million).
- The largest regional market for Low Voltage Connection Components in 2001 was Western Europe (US\$17,129 million) followed by North America (US\$9,927 million) and the Far East (US\$7,168 million).
- World production of Low Voltage Connection Components was estimated at US\$36,158 million in 2000.
- The largest producer in 2000 was the USA, with production totalling US\$6,267 million.
- Reported exports of Low Voltage Connection Components totalled US\$28,720 million in 1999.
- The largest exporter in 1999 was the USA (US\$4,438 million) followed by Germany (US\$4,337 million) and Japan (US\$3,802 million).
- Reported imports of Low Voltage Connection Components in 1999 totalled US\$30,920 million.
- The largest importer was the USA (US\$4,887 million) followed by Mexico (US\$2,694 million) and Germany (US\$2,468 million)