

**The World Markets
and
Manufacturers of High Voltage
Switchgear
2012 - 2022**

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1. INTRODUCTION

1.1 OBJECTIVES AND SCOPE

The objective of this report is to provide a concise overview of the world market for High Voltage Switchgear. The report gives an estimate of the value of High Voltage Switchgear consumption in each national market, broken down by product type. The data given are 2008-2012 actual market values and estimated 2013 market values; forward projections through to 2022 are made on the basis of the infrastructure development in each country over the last 30 years.

For the purposes of this report the High Voltage Switchgear market is defined as comprising fuses/cut-outs; automatic circuit breakers (oil/air/SF6 - including reclosers); vacuum interrupters; isolating (make and break) switches; lightning arresters/limiters/suppressors; discrete panels/bays.

In other words, the report examines transmission and distribution substation components, not including HV Switchgear, capacitors, bus systems or relays. Values will not include application engineering, project management, installation or maintenance costs.

Within this report High Voltage Switchgear has been broken down into seven categories :

- **Fuses** (for a voltage exceeding 1000 volts)
- **Circuit Breakers** (Automatic, for a voltage exceeding 1000 volts but less than 72.5 kV)
- **Circuit Breakers** (Automatic, for a voltage exceeding 72.5 kV)
- **Switches** (Isolating and Make-and-Break, for a voltage exceeding 1000 volts)
- **Distribution and Control Panels** (for a voltage exceeding 1000 volts)
- **Lightning Arresters** (including voltage limiters and surge suppressors, for a voltage exceeding 1000 volts)
- **Other** (Other electrical apparatus for switching or protecting electrical circuits, or for making connections to or in electrical circuits, including boards, panels [including numerical control panels] consoles, desks, cabinets etc. for electric control or the distribution of electricity) for a voltage exceeding 1000 volts.

The market sizes for High Voltage Switchgear are also broken down by voltage, into the following voltage ranges:

- **1 – 49 kV**
- **50 – 150 kV**
- **>150 kV**

The market sizes for High Voltage Switchgear are also broken down by type of use, into the following voltage categories:

- **Switchyards and Major Substations**
- **Overhead Line Gear**
- **Primary Distribution Equipment**
- **Secondary Distribution Equipment**

Distribution switchgear is further segmented into:

- **Distribution Switchgear (Outdoor use)**
- **Distribution Switchgear (Indoor use)**

The market sizes for High Voltage Switchgear are also broken down by type of customer, into the following voltage categories:

- **Utility Companies**
- **Construction and Industry**
- **Rail and Transport**
- **Mining, Marine and Offshore**

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

1.2 METHODOLOGY

Data in the markets report is presented in US dollars (conversion tables are included in the appendices). The salient points of the methodology are as follows:-

- 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 2008 – 2012 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. Market sizes for 2013 are estimated by analysing a range of economic indicators together with trends in trade flow and the pattern of market size growth over the period 2005-2012.
- Market values for the period 2014 to 2022 have been estimated based on two separate methodologies. Firstly the past growth rate in market values for each country have been extrapolated and have been compared with general macro-economic indicators such as GDP, GDP growth and inputs to the value added for each economy. Secondly, the development of the electrical power system in each country has been studied to provide indications for future system growth, and hence market growth.
- 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 is based on intelligence about 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.

Clients that have purchased previous editions of this report will notice several changes in the content and presentation of this edition. Firstly the contact directory, which was previously published as a separate report has now been incorporated in Section 4 of this report. The addition of a greater depth of information on market segmentation lead us to believe that one complete report covering markets and manufacturers would be more useful to purchasers.

Secondly as alluded to above this edition contains a more detailed analysis of the market in each country. We have also changed the source of trade data that has been in this report. Previous editions have used the Standard International Classification system, revision 3 - SITC Rev 3; in this edition the Harmonised System HS2002 has been used. This has allowed a greater depth of analysis of international trade by type of equipment. 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. SUMMARY

The global market for HV Switchgear was valued at US\$***** million in 2012 having grown at a cagr of 4.47% between 2008 and 2012.

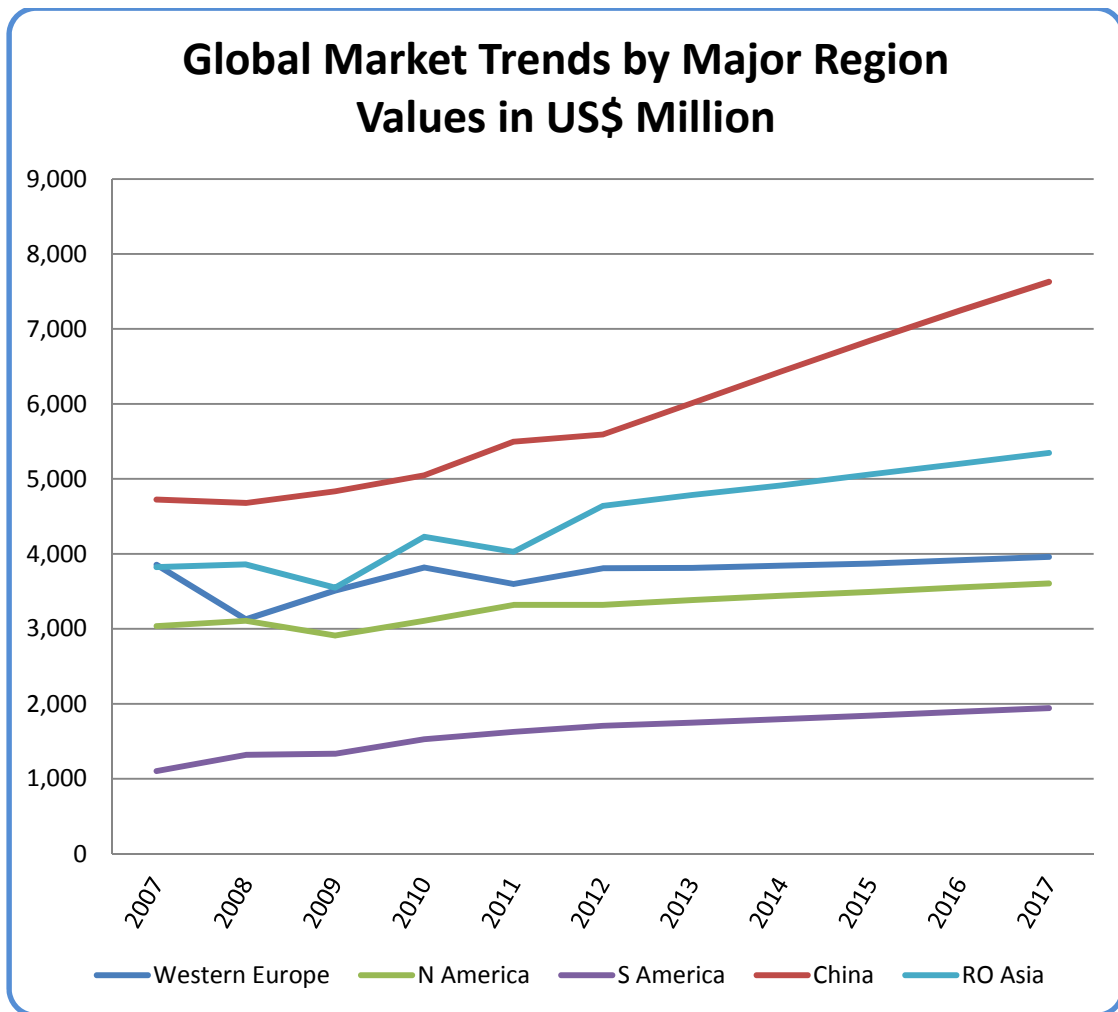
We forecast that the global market will increase at a cagr of *****% to reach US\$***** million in 2022 – based on 2012 prices.

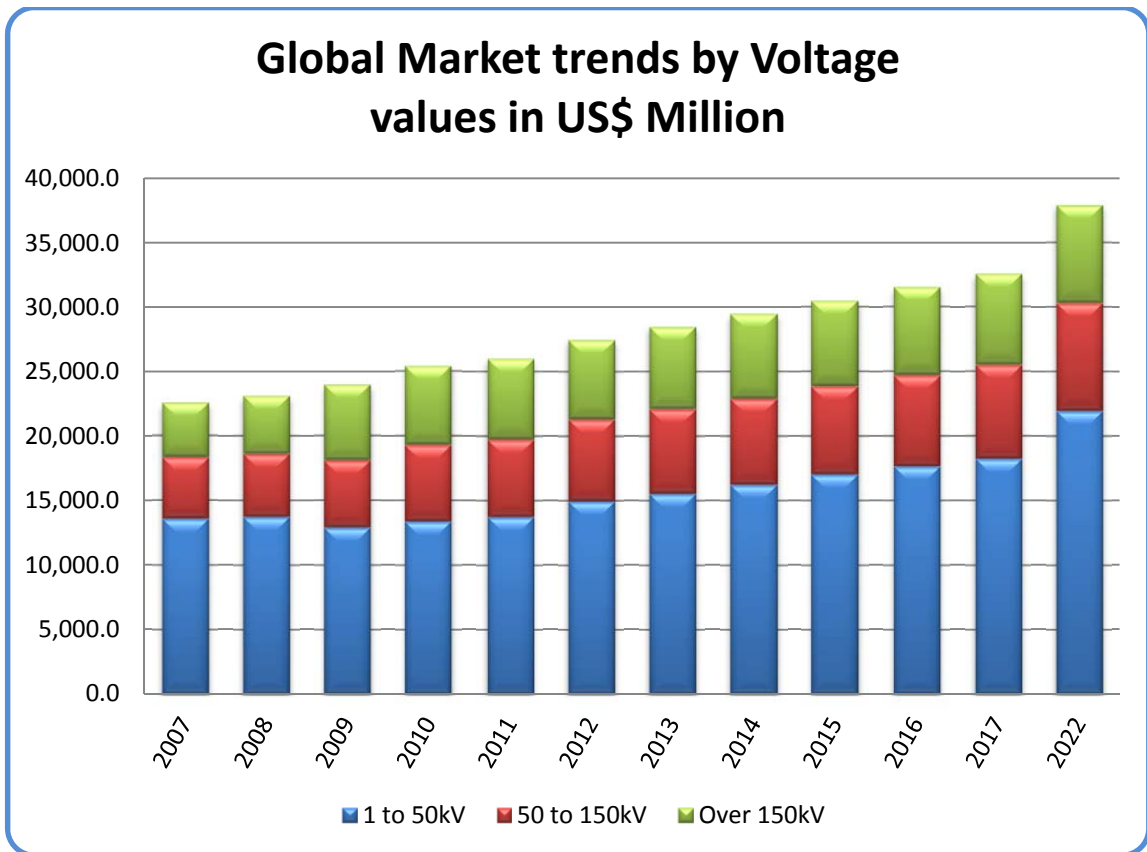
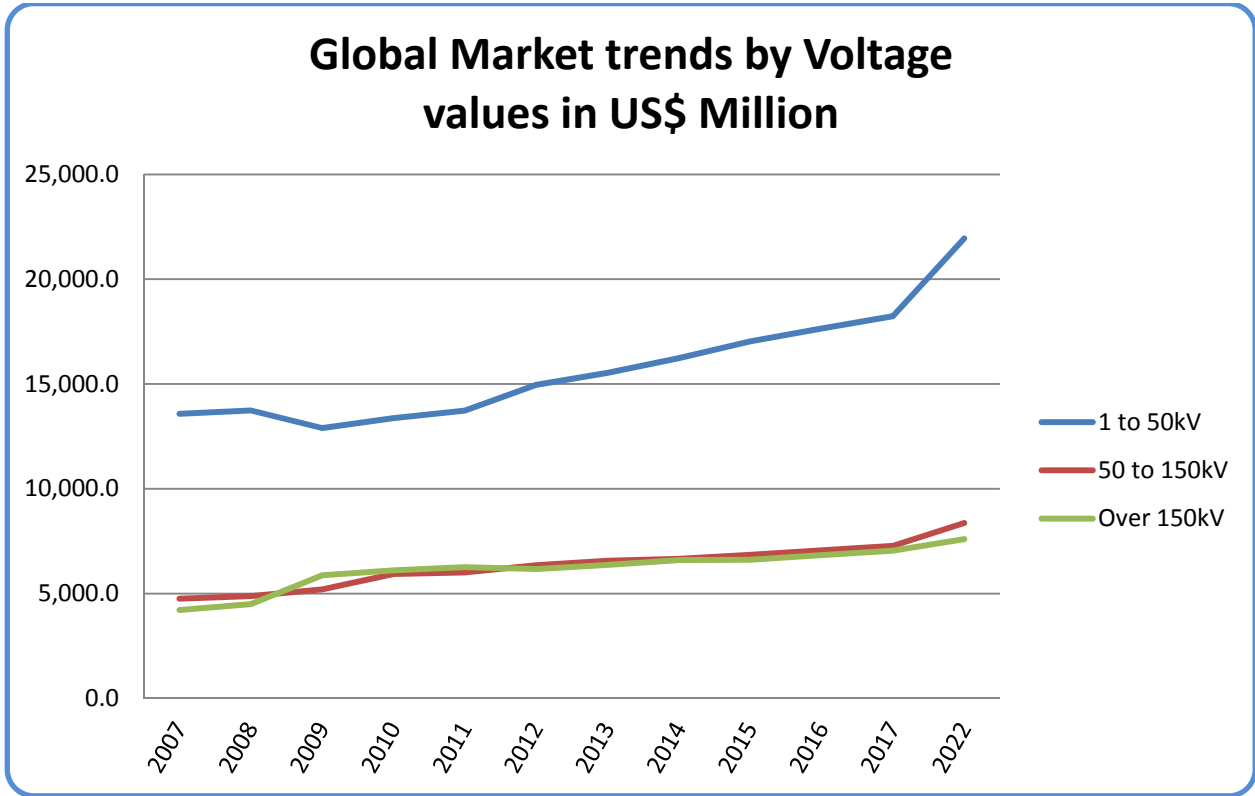
The largest national market in 2012 was that of China, which was valued at US\$***** million and which accounted for *****% of the overall world market.

The second largest national market was that of ***** (US\$***** million) followed by ***** (US\$***** million) and ***** (US\$***** million).

The largest regional market for HV Switchgear in 2012 was Asia (US\$***** million) followed by Western Europe (US\$***** million) and North America (US\$***** million).

These growth have not been uniform across the globe neither has the consumption of switchgear across the voltage range. The figures are shown in the charts below:-





The market for distribution switchgear in the range nominally up to 50kV clearly declined globally in 2009 as a short term reaction to the financial crash and was not back on trend until 2012.

Switchgear demand at higher voltages continued to increase during that period but has virtually flat lined from 2010 and the future growth is expected to be at very modest rates until the end of the decade.

The market in Western Europe fell steeply in 2008, shows a double dip but then increases gradually for the forecast period. This pattern is mirrored by Asia (not including China) but commencing a year later in 2009.

North America also fell in 2009 but does not show a second dip and is forecast to grow at a higher rate.

The market in China stagnated in 2008/2009, increased until 2011 and then slowed again in 2012. The growth through to the end of the forecast period will be in the order of 5 to 6% cagr – roughly half the rates experienced up to 2008.

The largest producer in 2012 was China, with production totalling US\$***** million, or ****% of global production.

Reported exports of HV Switchgear totalled US\$***** million in 2012.

The largest exporter in 2012 was Germany (US\$***** million), followed by the USA (US\$***** million), China (US\$***** million) and by France (US\$***** million). This varies significantly from the 2009 picture which showed the largest exporter in 2009 was Germany (US\$***** million), followed by France (US\$***** million) and the USA (US\$*****million).

The largest importer in 2012 was the USA (US\$*****million) followed by Germany (US\$*****million), Saudi Arabia (US\$***** million), Russia (US\$***** million) and China (US\$*****million). This can be compared to the 2009 figures which showed; the largest importer in 2009 was China (US\$***** million) followed by Germany (US\$***** million) and The USA (US\$***** million).

The supplier base continues to evolve in reaction to the markets. *****is the largest producer of HV Switchgear with products across the full spectrum of the high voltage range and the company's world market share is estimated to be a little under ****%. ***** is second at a little over ****% and ***** remains in third place. The ***** share of the global market has settled at about ****%; *****r share has now increased to over ****%.

The US\$11.8 billion acquisition of Cooper Industries by Eaton Corp which was completed at the end of 2012 has also impacted on the market, especially in the 1 to 50kV segment where both had activities. Pre-merger we estimated their global shares at ****% with Cooper at ****% and Eaton at ****%. It seems that the greatest effect of the combined entity will be in the low voltage sector; nevertheless, together we now estimate their combined share of the HV market at ****% on a market that has also grown in the interim.

2.1 SUMMARY TABLES

Table 1

The Fastest Growing National Markets for HV Switchgear 2008 - 2012 (US\$ Million)

Country	Market Size 2008	Market Size 2012	% Change 2008 - 2012

Source: Goulden Reports and United Nations

Note: Only countries with market sizes greater than US\$50 million are included in this section. Smaller markets may display significantly larger percentage changes.

Table 2
The Fastest Growing National Markets for HV Switchgear
2010 - 2012 (US\$ Million)

Country	Market Size 2010	Market Size 2012	% Change 2010 - 2012

Source: Goulden Reports and United Nations

Note: Only countries with market sizes greater than US\$50 million are included in this section. Smaller markets may display significantly larger percentage changes.

Table 3
**The Fastest Declining National Markets for HV Switchgear
2008 - 2012 (US\$ Million)**

Country	Market Size 2008	Market Size 2012	% Change 2008 - 2012

Source: Goulden Reports and United Nations

Note: Only countries with market sizes greater than US\$25 million are included in this section. Smaller markets may display significantly larger percentage changes.

Table 4
**The Fastest Declining National Markets for HV Switchgear
2010 – 2012 (US\$ Million)**

Country	Market Size 2010	Market Size 2012	% Change 2010 - 2012

Source: Goulden Reports and United Nations

Note: Only countries with market sizes greater than US\$50 million are included in this section. Smaller markets may display significantly larger percentage changes.

Table 5

The Largest National Markets for HV Switchgear 2012 (US\$ Million)

Country	Market Size 2012	% Global Market

Source: Goulden Reports and United Nations

Table 6

The Largest National Markets for HV Switchgear 2022 (US\$ Million)

Country	Market Size 2022	% Global Market

Source: Goulden Reports and United Nations

3. THE WORLD MARKET

Table 7

The World Market for HV Switchgear, by Region, 2008- 2013 (US\$ Million)

Region	2008	2009	2010	2011	2012	2013
Western Europe						
Eastern Europe						
Former USSR						
North Africa						
West Africa						
Central Africa						
East Africa						
Southern Africa						
Middle East						
Indian Sub Continent						
Asia						
South America						
Central America & Carib						
North America						
Oceania						
Total						

Source: Goulden Reports and United Nations

Table 8

The World Market for HV Switchgear, by Region, 2008 - 2013 (% Change)

Region	2009/2008	2010/2009	2011/2010	2012/2011	2013/2012
Western Europe					
Eastern Europe					
Former USSR					
North Africa					
West Africa					
Central Africa					
East Africa					
Southern Africa					
Middle East					
Indian Sub Continent					
Asia					
South America					
Central America & Carib					
North America					
Oceania					
Total					

Source: Goulden Reports and United Nations

Table 9

The World Market for HV Switchgear, by Region, by Equipment Type 2012 (US\$ Million)

Region	Fuses	ACB's 1 to 72.5kV	ACB's > 72.5kV	Switches	Lightning Arresters	Other Equip'nt	Panels	Total million (\$)
Western Europe								
Eastern Europe								
Former USSR								
North Africa								
West Africa								
Central Africa								
East Africa								
Southern Africa								
Middle East								
Indian Sub Continent								
Asia								
South America								
Cent. America & Carib.								
North America								
Oceania								
Total								

Source: Goulden Reports and United Nations

Table 10

The World Market for HV Switchgear, by Region, by Voltage Level 2012 (US\$ Million)

Region	1 – 50kV	50 to 150kV	Over 150kV	Total
Western Europe				
Eastern Europe				
Former USSR				
North Africa				
West Africa				
Central Africa				
East Africa				
Southern Africa				
Middle East				
Indian Sub Continent				
Asia				
South America				
Cent. America & Carib.				
North America				
Oceania				
Total				

Source: Goulden Reports and United Nations

Table 11

The World Market for HV Distribution Switchgear, by Region, by Location 2012 (US\$ Million)

Region	Distribution Switchgear Outdoor	Distribution Switchgear Indoor	Total
Western Europe			
Eastern Europe			
Former USSR			
North Africa			
West Africa			
Central Africa			
East Africa			
Southern Africa			
Middle East			
Indian Sub Continent			
Asia			
South America			
Cent. America & Carib.			
North America			
Oceania			
Total			

Source: Goulden Reports and United Nations

Table 12

The World Market for HV Switchgear, by Region, by Type of Use 2012 (US\$ Million)

Region	S/yards & Major Subst'ns.	Overhead Line Gear	Primary Dist'ution Equipment	Secondary Dist'ution Equipment	Total
Western Europe					
Eastern Europe					
Former USSR					
North Africa					
West Africa					
Central Africa					
East Africa					
Southern Africa					
Middle East					
Indian Sub Continent					
Asia					
South America					
Cent. America & Carib					
North America					
Oceania					
Total					

Source: Goulden Reports and United Nations

Table 13

The World Market for HV Switchgear, by Region, by End Use Customer 2012 (US\$ Million)

Region	Utility Organisations	Construction & Industry	Rail & Transport	Mining, Marine & Offshore	Total
Western Europe					
Eastern Europe					
Former USSR					
North Africa					
West Africa					
Central Africa					
East Africa					
Southern Africa					
Middle East					
Indian Sub Continent					
Asia					
South America					
Cent. America & Carib.					
North America					
Oceania					
Total					

Source: Goulden Reports and United Nations

3.1 FORECAST WORLD MARKET 2013 - 2022

Table 14

The Forecast World Market for HV Switchgear, by Region, 2013 to 2022 (US\$ Million)

Region	2013	2014	2015	2016	2017	2022	cagr
Western Europe							
Eastern Europe							
Former USSR							
North Africa							
West Africa							
Central Africa							
East Africa							
Southern Africa							
Middle East							
Indian Sub Continent							
Asia							
South America							
Cent. America & Carib.							
North America							
Oceania							
Total							

Source: Goulden Reports

Table 15

The Forecast World Market for HV Switchgear, by Region, 2013 to 2022 (% Change)

Region	2014/13	2015/14	2016/15	2017/16	2022/17	2022/13 cagr
Western Europe						
Eastern Europe						
Former USSR						
North Africa						
West Africa						
Central Africa						
East Africa						
Southern Africa						
Middle East						
Indian Sub Continent						
Asia						
South America						
Cent. America & Carib.						
North America						
Oceania						
Total						

Source: Goulden Reports

Table 16

The World Market for HV Switchgear, by Region, by Equipment Type 2022 (US\$ Million)

Region	Fuses	ACB's 1 to 72.5kV	ACB's > 72.5kV	Switches	Lightning Arresters	Other Equip'nt	Panels	Total million (\$)
Western Europe								
Eastern Europe								
Former USSR								
North Africa								
West Africa								
Central Africa								
East Africa								
Southern Africa								
Middle East								
Indian Sub Continent								
Asia								
South America								
Cent. America & Carib.								
North America								
Oceania								
Total								

Source: Goulden Reports and United Nations

Table 17

The World Market for HV Switchgear, by Region, by Voltage Level 2022 (US\$ Million)

Region	1 – 50kV	50 to 150kV	Over 150kV	Total
Western Europe				
Eastern Europe				
Former USSR				
North Africa				
West Africa				
Central Africa				
East Africa				
Southern Africa				
Middle East				
Indian Sub Continent				
Asia				
South America				
Cent. America & Carib.				
North America				
Oceania				
Total				

Source: Goulden Reports and United Nations

Table 18

The World Market for HV Distribution Switchgear, by Region, by Location 2022 (US\$ Million)

Region	Distribution Switchgear Outdoor	Distribution Switchgear Indoor	Total
Western Europe			
Eastern Europe			
Former USSR			
North Africa			
West Africa			
Central Africa			
East Africa			
Southern Africa			
Middle East			
Indian Sub Continent			
Asia			
South America			
Cent. America & Carib.			
North America			
Oceania			
Total			

Source: Goulden Reports and United Nations

Table 19

The World Market for HV Switchgear, by Region, by Type of Use 2022 (US\$ Million)

Region	S/yards & Major Subst'ns.	Overhead Line Gear	Primary Dist'ution Equipment	Secondary Dist'ution Equipment	Total
Western Europe					
Eastern Europe					
Former USSR					
North Africa					
West Africa					
Central Africa					
East Africa					
Southern Africa					
Middle East					
Indian Sub Continent					
Asia					
South America					
Cent. America & Carib					
North America					
Oceania					
Total					

Source: Goulden Reports and United Nations

Table 20

The World Market for HV Switchgear, by Region, by End Use Customer 2022 (US\$ Million)

Region	Utility Organisations	Construction & Industry	Rail & Transport	Mining, Marine & Offshore	Total
Western Europe					
Eastern Europe					
Former USSR					
North Africa					
West Africa					
Central Africa					
East Africa					
Southern Africa					
Middle East					
Indian Sub Continent					
Asia					
South America					
Cent. America & Carib.					
North America					
Oceania					
Total					

Source: Goulden Reports and United Nations

4. MAJOR HIGH VOLTAGE SWITCHGEAR MANUFACTURERS

The figures in this section are from published annual company reports and other official sources. The figures are, however, designed to serve as a general overview – inaccuracies may occur as a result of exchange rate fluctuations or insufficient primary data.

Table 21

Leading Manufacturers' Sales of HV Switchgear 2012 (US\$ Million)

Company	Country	Total Company Sales 2012	HV Switchgear Sales 2012	HV Switchgear % of Sales 2012	Estimated World Market Share %

Source: Goulden Reports

Table 22

Leading Manufacturers' Sales of HV Switchgear, per Region, 2012 (US\$ Million)

Company	Western Europe	Eastern Europe & Former USSR	Africa	Middle East

continued...

Table 23

Leading Manufacturers' Sales of HV Switchgear, per Region, 2012 (US\$ Million) - continued

Company	Asia-Pacific	North America	South & Central America & Caribbean	Total

Source: Goulden Reports

4.1 HV SWITCHGEAR INDUSTRY CONTACT DETAILS

4.2 Argentina

Alstom Grid SA	Avda Leandro N. Alem 896, Piso 5 1001 Buenos Aires Argentina	Tel: +54 11 4891 9600 Fax: +54 11 4311 1040
Eaton Argentina	Calle Reconquista 656 Piso Buenos Aires Argentina	Tel: +54 11 4315 4066 Fax: +54 11 4314 8946
Hitachi Argentina SA	Carlos Pellegrini 1363, Piso 1 1011 Buenos Aires Argentina	Tel: +54 11 4394 5452 Fax: +54 11 4394 5416
Mitsubishi Argentina SA	Florida 890-20 Piso 1005 Buenos Aires Argentina	Tel: +54 1 311 4549 Fax: +54 1 311 4801
Eaton MElectric SA	Habana 3346 1419 Buenos Aires Argentina	Tel: +54 11 45 74 04 11 Fax: +54 11 45 74 48 17
Polet Srl	Calle 31, 3271/73 San Andres 1651 Buenos Aires Argentina	Tel: +54 1 754 1221 Fax: +54 1 754 1221
Siemens SA	Calle No 122, 4785, Ruta 8, Km 18 Casilla De Correo 32 1650 San Martin, Prov. De Buenos Aires Argentina	Tel: +54 11 47 38 71 00 Fax: +54 11 47 38 71 71
Siemens SA	Casilla De Correo 12 32 1000 Buenos Aires Argentina	Tel: +54 11 43 40 84 00 Fax: +54 11 43 31 99 97
Telsin Srl	Moldes 1971, Floor 286 1428 Buenos Aires Argentina	Tel: +54 1 785 7754 Fax: +54 1 785 7754
Siemens Argentina SA	Av Cordoba 1561, Piso 12 1055 Buenos Aires Argentina	Tel: +54 1 815 3964 Fax: +54 1 815 3968

4.59 USA

AB Chance	220 North Allen Street Centralia Mo 65240-1395 USA	Tel: +1 573 682 5521 Fax: +1 573 682 8714
ABB	1229 Westerham Drive Wake Forest Nc 27587 USA	Tel: +1 919 870 6470 Fax: +1 919 870 6470
ABB Inc	Po Box 5308 501 Merritt 7, Norwalk Ct 06856-5308 USA	Tel: +1 203 750 2200 Fax: +1 203 750 2263

ABB Inc	940 Main Campus Drive Raleigh Nc 27606 USA	Tel: +1 919 856 2513 Fax: +1 919 856 3810
ABB Power T&D Co Inc	500 West Highway 94 Jefferson City Mo 65101-5032 USA	Tel: +1 573 659 6316 Fax: +1 573 634 7823
ABB Power T&D Co Ltd	Po Box 6005 North Brunswick Nj 08902 USA	Tel: +1 732 932 6319 Fax: +1 732 932 6373
ABB Power T&D Company	1128 Highway 412 Alamo Tn 38001 3813 USA	Tel: +1 901 696 5222 Fax: +1 901 686 5269
Alstom Grid Inc	10801 Kemgwood Drive, Suite 1 Houston Texas 77043-1412 USA	Tel: +1 713 939 0091 Fax: +1 713 939 0134
Alstom Grid USA Inc - P&C Division	300 Tice Boulevard Woodcliff Lake Nj 07677-0406 USA	Tel: +1 914 347 5166 Fax: +1 914 347 5508
Ansaldo North America Inc	Mountain Heights Center 188 State Route 10 East Hanover, Nj 07936-2108 USA	Tel: +1 973 781 1500 Fax: +1 973 781 1510
Applied Dynamics Corporation	Butternut Street, 1-91 Industrial Park Greenfield Ma 01301 USA	Tel: +1 413 774 7268 Fax: +1 413 773 7919
Belyea Co Ltd	2200 Northwood Avenue Easton Pa 18045 USA	Tel: +1 610 515 5775 Fax: +1 610 258 1230
Carolina Products Inc	1132 Pro Am Drive Charlotte Nc 28211 USA	Tel: +1 800 736 4455 Fax: +1 704 367 1216
Central Electric Company	Highway 54 S. And Route Bb Fulton Mo 65251 USA	Tel: +1 573 642 6811 Fax: +1 573 642 6844
Ciba Specialty Chemicals	Performance Polymers 4917 Dawn Avenue East Lansing, Mi 48823-5691 USA	Tel: +1 517 351 5900 Fax:
Circuit Breaker Industries Inc	35 East Uwchlan Avenue, Suite 328 Exton Pa 19341 USA	Tel: +1 610 524 9949 Fax: +1 610 524 9945
Circuit Breaker Sales Company Inc	1315 Columbine Gainesville	Tel: +1 800 232 5809 Fax: +1 940 665 8971

	Tx 76240 USA	
Eaton/Cooper Industries Bussman Division	Po Box 14460e St. Louis Mo 63178-4460 USA	Tel: +1 314 394 2877 Fax: +1 314 527 1413
Eaton/Cooper Industries Inc	600 Travis, Suite 5800 Houston Tx 77002 USA	Tel: +1 713 209 8400 Fax:
Eaton/Cooper Power Systems Inc	2300 Badger Drive Waukesha Wi 53188-5931 USA	Tel: +1 262 896 2400 Fax: +1 262 896 2313
Eaton/Cooper Power Systems Inc	1900 E. North Street Waukesha Wi 53188-3899 USA	Tel: +1 414 524 4411 Fax: +1 414 524 4527
Eaton Inc	1000 Cherrington Parkway Moon Township Pa 15108-4312 USA	Tel: +1 412 893 3933 Fax: +1 412 893 2100
Eaton Inc	200 Westinghouse Circle Horseheads Ny 14845-1942 USA	Tel: +1 607 796 3307 Fax: +1 607 796 3364
Davis H Elliot Company Inc	Po Box 12707 Roanoke Va 24027 USA	Tel: +1 540 992 2865 Fax: +1 540 992 1495
Db Associates	7717 Foxtrail Lane Cincinnati, Ohio 45255 USA	Tel: +1 513 231 4370 Fax: +1 513 231 4365
Eaton Corporation	1111 Superior Avenue Cleveland Oh 44114 USA	Tel: +1 216 523 5000 Fax: +1 216 479 7014



Electrical Power Systems Inc	6747 S. 65th W. Avenue Tulsa Ok 74131 USA	Tel: +1 918 445 4444 Fax: +1 918 446 6818
Enercon Engineering Inc	No. 1 Altorfer Lane East Peoria Il 61611 USA	Tel: +1 309 694 1418 Fax: +1 309 694 3703
Energyline Systems	1135 Atlantic Avenue Alameda Ca 94501-1145 USA	Tel: +1 510 644 8157 Fax:
Federal Pacific Company	Switchgear Division Po Box 8200 Bristol, Va 24203 USA	Tel: +1 540 466 8200 Fax: +1 540 645 8212
Ferraz Shawmut	374 Merrimac Street Newbury Port Ma 01950 USA	Tel: +1 978 462 6662 Fax: +1 978 462 3131
Ferraz Shawmut	115 Route 46, Suite A4 Mountain Lakes Nj 07046-1655 USA	Tel: +1 Fax: +1
Ferraz Shawmut Inc	22 Wiggin Way Stratham Nh 03885 USA	Tel: +1 978 465 4206 Fax:
Fuji Electric Corp Of America	Park 80, West Plaza Ii Saddle Brook Nj 07663 USA	Tel: +1 201 712 0555 Fax: +1 201 368 8258
Fuji Electric Corp Of America	47520 Westinghouse Drive Fremont Ca 94538 USA	Tel: +1 510 438 9700 Fax: +1 510 438 9753
Fuji Electric Corp Of America	One Park Plaza, Suite 850 Irvine Ca 92714 USA	Tel: +1 714 251 9600 Fax: +1 714 251 9611
G&W Electric Co	3500 West 127th Street Blue Island Il 60406 USA	Tel: +1 708 388 5010 Fax: +1 708 388 0755
GE Switchgear	510 East Agency Road West Burlington Ia 52655 USA	Tel: +1 319 753 8400 Fax: +1 319 753 8481
General Electric Co Electrical Distribution	41 Woodford Avenue Plainville, Ct 06062 USA	Tel: +1 203 747 7111 Fax:
General Electric Company	3135 Easton Turnpike Fairfield Ct 06430-5163 USA	Tel: +1 203 373 2211 Fax: +1 203 373 3131

General Electric Company	381 Broadway Fort Edward Ny 12828-1000 USA	Tel: +1 518 746 5429 Fax: +1 518 746 5726
Global Atmospherics Inc	2705 E. Medina Road Tucson Az 85706-7155 USA	Tel: +1 520 741 2838 Fax: +1 520 741 2848
High Voltage Supply	9011 Governors Row Dallas Tx 75247 USA	Tel: +1 800 338 5526 Fax:
Hitachi America Ltd	50 Prospect Avenue Tarrytown Ny 10591 USA	Tel: +1 914 332 5800 Fax: +1 914 332 5555
Eaton Electric - Holec Inc	500 Industrial Road Sugar Land Houston, Tx 77478 USA	Tel: +1 713 240 1660 Fax: +1 713 240 5074
Hubbell Inc	584 Derby Milford Road Orange Ct 06477-4024 USA	Tel: +1 203 799 4100 Fax: +1 203 799 4205
Hyundai Heavy Industries Co Ltd	300 Sylvan Avenue Englewood Cliffs Nj 07632 USA	Tel: +1 201 816 4080 Fax: +1 201 816 4083
Industrial Electric Manufacturing	982 Washington Boulevard Fremont Ca 94539-5222 USA	Tel: +1 510 656 1600 Fax: +1 510 360 1295
Industrial Motion Technologies Inc	3025 Harbor Lane, Suite 235 Plymouth Mn 55447 USA	Tel: +1 612 559 36 39 Fax: +1 612 559 37 78
Industrial Sales & Engineering Co	1111 E 54th Street Indianapolis In 46220 USA	Tel: +1 317 255 1327 Fax: +1 317 255 6990
Keathley-Patterson Electric Co	1102 Sterwin Springdale Ar 72764 USA	Tel: +1 501 756 0200 Fax: +1 501 756 6706
Maclean Power Systems	11411 Adison Street Franklin Park Illinois 60131 USA	Tel: +1 847 455 0014 Fax: +1 847 455 0029
Meidensha Corporation	American Centre Building, Ste 1110 27777 Franklin Road, Southfield Mi 48034 USA	Tel: +1 248 353 2540 Fax: +1 248 353 3150



Merlin Gerin Inc	5000 Highlands Pkwy Ste 150 Smyrna Ga 30082 USA	Tel: +1 404 432 2744 Fax:
Metron Power Distribution	1505 West Third Avenue Denver Co 80223 USA	Tel: +1 303 592 1903 Fax:
Mitsubishi Electric Power Products Inc	Thorn Hill Industrial Park 549b Keystone Drive Warrendale, Pa 15086 USA	Tel: +1 724 779 3330 Fax: +1 724 772 2149
Mitsubishi Heavy Industries America Inc	660 Newport Centre Drive, Suite 1000 Newport Beach Ca 92660 USA	Tel: +1 949 640 4664 Fax: +1 949 640 6945
Mitsubishi Heavy Industries Ltd	100 Colonial Centre Parkway Lake Mary Fl 32746 USA	Tel: +1 407 668 6100 Fax: +1 407 688 6480
Eaton MElectric Corporation	25 Forge Parkway Franklin Ma 02038 USA	Tel: +1 508 520 7080 Fax: +1 508 520 7084
Nissin Electric Co Ltd	900 East Hamilton Avenue, Suite 100 Campbell Ca 95008-0668 USA	Tel: +1 408 737 0274 Fax: +1 408 737 8924
North American Switchgear Inc	12502 Berea Road Cleveland Oh 44111 USA	Tel: +1 216 941 3660 Fax: +1 216 941 3121
Schneider - Nu-Lec Llc	1252 Old Alpharetta Road Alpharetta Ga 3005-3986 USA	Tel: +1 770 521 2000 Fax: +1 770 521 2100
Pacs Industries	61 Steamboat Road Great Neck Ny 11022 USA	Tel: +1 516 829 9060 Fax: +1 516 829 9557
PCI - Power Controls Inc	7400 Bandini Boulevard City Of Commerce Ca 90040 USA	Tel: +1 323 722 9536 Fax: +1 323 722 9536
Penn Panel & Box Company	Wilows Avenue Po Box 1458 Collingdale Pa 19023-8458 USA	Tel: +1 610 586 2700 Fax: +1 610 522 0390
Point Eight Power Inc	1510 Engineers Road Belle Chasse La 70037 USA	Tel: +1 504 394 6100 Fax: +1 504 394 6686

Positron Industries Inc	962 Coronado Drive Sedalia Co 80135 USA	Tel: +1 303 688 5800 Fax: +1 303 688 5551
Powell Electrical Manufacturing	Po Box 12818 Houston Tx 77217-2818 USA	Tel: +1 713 947 4414 Fax: +1 713 947 4453
Powercon Corporation	1551 Florida Avenue Po Box 477 Severn, Maryland 21144 USA	Tel: +1 410 551 6500 Fax: +1 410 551 8451
Pringle Electrical Manufacturing Co, Inc	205 Progress Drive Montgomeryville Pa 18936 USA	Tel: +1 215 699 0100 Fax: +1 215 699 3056
RDC Electrical Corp	3411 S. 44th Street Phoenix Az 85040 USA	Tel: +1 602 437 0760 Fax: +1 480 829 7350
Romac	7400 Bandini Boulevard Commerce Ca 90040 USA	Tel: +1 800 77-Romac Fax: +1 800 722 9536
Rosen's Electrical Equipment Company	8226 East Whittier Boulevard Pico Rivera Ca 90660 USA	Tel: +1 562 695 9000 Fax: +1 562 699 5196
S&C Electric Company	6601 North Ridge Boulevard Chicago Il 60626-3997 USA	Tel: +1 773 338 1000 Fax: +1 773 338 2562
S&S Energy Products	2707 North Loop West Houston Tx 77008 USA	Tel: +1 713 803 0950 Fax: +1 713 869 8365
Schweitzer Engineering Laboratories Inc	2350 Ne Hopkins Court Pullman Wa 99163-5603 USA	Tel: +1 509 332 1890 Fax: +1 509 332 7990
Siemens Corporation	186 Wood Avenue South Iselin Nj 08830-2770 USA	Tel: +1 732 321 3100 Fax: +1 732 906 3816
Siemens Corporation	701 Pennsylvania Ave, Ste 720 Washington Dc 20004 USA	Tel: +1 202 434 4800 Fax: +1 202 347 4015
Siemens Distribution Products Division	5400 Triangle Parkway Norcross Ga 30092-2540 USA	Tel: +1 770 326 2000 Fax: +1 770 326 4703



Siemens Energy & Automation Inc	Po Box 29503 Raleigh Nc 27626-9503 USA	Tel: +1 919 365 2200 Fax: +1 919 365 6363
Southern States Inc	30 Georgia Avenue Hampton Georgia 30228 USA	Tel: +1 770 946 4562 Fax: +1 770 946 8106
Switchgear Unlimited Inc	1401 Mercantile Court Plant City Fl 33567 USA	Tel: +1 800 685 6550 Fax: +1 813 754 0003
The Dynamic Group Ltd	173 S Mountain Street New Britain Ct 06052-1513 USA	Tel: +1 860 826 1244 Fax: +1 860 826 7383
Toshiba America Electronic Components Inc	9775 Irvine Way Irvine Ca 92618-1811 USA	Tel: +1 949 455 2000 Fax: +1 949 859 3963
Toshiba America Inc	1251 Avenue Of The Americas, 41f New York Ny 10020 USA	Tel: +1 212 596 0600 Fax: +1 212 593 3875
Transmission Products Inc	3024 Bells Road - P.O. Box 24657 Richmond Va 23234 USA	Tel: +1 804 233 8351 Fax: +1 804 233 5723
Trinetics, Inc	Po Box 8 Mayville Wi 53050-0008 USA	Tel: +1 219 259 8535 Fax: +1 219 259 8552
Waukesha Electric Systems	400 S. Prairie Avenue Waukesha Wi 53186-5940 USA	Tel: +1 414 547 0121 Fax: +1 414 521 0191
Wm Power Products Inc	Thorn Hill Ind. Park 512 Keystone Drive Warrendale, Pa 15086 USA	Tel: +1 412 772 2555 Fax:
Yaskawa Electric America Inc	5626 Corporate Avenue Cypress Ca 90630-4728 USA	Tel: +1 714 828 9692 Fax: +1 714 828 1165
Yaskawa Electric America Inc	2121 Norman Drive South Waukegan Il 60085-6751 USA	Tel: +1 847 887 7000 Fax: +1 847 887 7320

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5. REGIONAL MARKETS

5.1 WESTERN EUROPE

Table 24

Western Europe The Market for HV Switchgear, by Country, 2008 – 2013 (US\$ Million)

Country	2008	2009	2010	2011	2012	2013
Austria						
Belgium						
Cyprus						
Denmark						
Finland						
France						
Germany						
Greece						
Iceland						
Ireland						
Italy						
Luxembourg						
Malta						
Netherlands						
Norway						
Portugal						
Spain						
Sweden						
Switzerland						
UK						
Total						

Source: Goulden Reports and United Nations

Table 25

Western Europe: The Market for HV Switchgear, by Country, 2008 – 2013 (% Change)

Country	2009/2008	2010/2009	2011/2010	2012/2011	2013/2012	Cagr
Austria						
Belgium						
Cyprus						
Denmark						
Finland						
France						
Germany						
Greece						
Iceland						
Ireland						
Italy						
Luxembourg						
Malta						
Netherlands						
Norway						
Portugal						
Spain						
Sweden						
Switzerland						
UK						
Total						

Source: Goulden Reports and United Nations

Table 26

Western Europe: The Market for HV Switchgear, by Country, by Equipment Type 2012 (US\$ Million)

Country	Fuses	ACB's 1 to 72.5kV	ACB's > 72.5kV	Switches	Lightning Arresters	Other Equip'nt	Panels
Austria							
Belgium							
Cyprus							
Denmark							
Finland							
France							
Germany							
Greece							
Iceland							
Ireland							
Italy							
Luxembourg							
Malta							
Netherlands							
Norway							
Portugal							
Spain							
Sweden							
Switzerland							
UK							
Total							

Source: Goulden Reports and United Nations

Table 27

Western Europe: The Market for HV Switchgear, by Country, by Voltage 2012 (US\$ Million)

Country	1 – 50kV	50 to 150kV	Over 150kV	Total
Austria				
Belgium				
Cyprus				
Denmark				
Finland				
France				
Germany				
Greece				
Iceland				
Ireland				
Italy				
Luxembourg				
Malta				
Netherlands				
Norway				
Portugal				
Spain				
Sweden				
Switzerland				
United Kingdom				
Total				

Source: Goulden Reports and United Nations

Table 28

Western Europe: The Market for HV Distribution Switchgear, by Country, by Location 2012 (US\$ Million)

Country	Distribution Switchgear Outdoor	Distribution Switchgear Indoor	Total
Austria			
Belgium			
Cyprus			
Denmark			
Finland			
France			
Germany			
Greece			
Iceland			
Ireland			
Italy			
Luxembourg			
Malta			
Netherlands			
Norway			
Portugal			
Spain			
Sweden			
Switzerland			
United Kingdom			
Total			

Source: Goulden Reports and United Nations

Table 29

Western Europe: The Market for HV Switchgear, by Country, by Type of Use 2012 (US\$ Million)

Country	S/yards & Major Subst'ns.	Overhead Line Gear	Primary Dist'ution Equipment	Secondary Dist'ution Equipment	Total
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
United Kingdom					
Total					

Source: Goulden Reports and United Nations

Table 30

Western Europe: The Market for HV Switchgear, by Country, by End Use Customer 2012 (US\$ Million)

Country	Utility Organisations	Construction & Industry	Rail & Transport	Mining, Marine & Offshore	Total
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
United Kingdom					
Total					

Source: Goulden Reports and United Nations

Table 31

Western Europe: The Market for HV Switchgear, by Country, 2013 to 2022 (US\$ Million)

Country	2013	2014	2015	2016	2017	2022	cagr
Austria							
Belgium							
Cyprus							
Denmark							
Finland							
France							
Germany							
Greece							
Iceland							
Ireland							
Italy							
Luxembourg							
Malta							
Netherlands							
Norway							
Portugal							
Spain							
Sweden							
Switzerland							
United Kingdom							
Total							

Source: Goulden Reports and United Nations

Table 32

Western Europe: The Market for HV Switchgear, by Country, 2013 to 2022 (% Change)

Country	2014/13	2015/14	2016/15	2017/16	2022/17	2022/13 cagr
Austria						
Belgium						
Cyprus						
Denmark						
Finland						
France						
Germany						
Greece						
Iceland						
Ireland						
Italy						
Luxembourg						
Malta						
Netherlands						
Norway						
Portugal						
Spain						
Sweden						
Switzerland						
United Kingdom						
Total						

Source: Goulden Reports and United Nations

Table 33

Western Europe: The Market for HV Switchgear, by Country, by Equipment Type 2022 (US\$ Million)

Country	Fuses	ACB's 1 to 72.5kV	ACB's > 72.5kV	Switches	Lightning Arresters	Other Equip'nt	Panels
Austria							
Belgium							
Cyprus							
Denmark							
Finland							
France							
Germany							
Greece							
Iceland							
Ireland							
Italy							
Luxembourg							
Malta							
Netherlands							
Norway							
Portugal							
Spain							
Sweden							
Switzerland							
UK							
Total							

Source: Goulden Reports and United Nations

Table 34

Western Europe: The Market for HV Switchgear, by Country, by Voltage 2022 (US\$ Million)

Country	1 – 50kV	50 to 150kV	Over 150kV	Total
Austria				
Belgium				
Cyprus				
Denmark				
Finland				
France				
Germany				
Greece				
Iceland				
Ireland				
Italy				
Luxembourg				
Malta				
Netherlands				
Norway				
Portugal				
Spain				
Sweden				
Switzerland				
United Kingdom				
Total				

Source: Goulden Reports and United Nations

Table 35

Western Europe: The Market for HV Distribution Switchgear, by Country, by Location 2022 (US\$ Million)

Country	Distribution Switchgear Outdoor	Distribution Switchgear Indoor	Total
Austria			
Belgium			
Cyprus			
Denmark			
Finland			
France			
Germany			
Greece			
Iceland			
Ireland			
Italy			
Luxembourg			
Malta			
Netherlands			
Norway			
Portugal			
Spain			
Sweden			
Switzerland			
United Kingdom			
Total			

Source: Goulden Reports and United Nations

Table 36

Western Europe: The Market for HV Switchgear, by Country, by Type of Use 2022 (US\$ Million)

Country	S/yards & Major Subst'ns.	Overhead Line Gear	Primary Dist'ution Equipment	Secondary Dist'ution Equipment	Total
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
United Kingdom					
Total					

Source: Goulden Reports and United Nations

Table 37

Western Europe: The Market for HV Switchgear, by Country, by End Use Customer 2022 (US\$ Million)

Country	Utility Organisations	Construction & Industry	Rail & Transport	Mining, Marine & Offshore	Total
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
United Kingdom					
Total					

Source: Goulden Reports and United Nations

5.2 EASTERN EUROPE

5.3 FORMER SOVIET UNION

5.4 NORTH AFRICA

5.5 WEST AFRICA

5.6 CENTRAL AFRICA

5.7 EAST AFRICA

5.8 SOUTHERN AFRICA

5.9 MIDDLE EAST

5.10 INDIAN SUB CONTINENT

5.11 ASIA

5.12 SOUTH AMERICA

5.13 CENTRAL AMERICA AND CARIBBEAN

5.14 NORTH AMERICA

5.15 OCEANIA

6. PRODUCTION

Table 38

The Top 25 Producers of HV Switchgear, 2012 (US\$ Million)

Country	Production	% share

Source: Goulden Reports and United Nations

7. TRADE ANALYSIS

7.1 TOP 25 EXPORTERS

Table 39

The Top 25 Exporters of HV Switchgear, 2010 to 2012 (US\$ Millions)

Table 40

The Top 25 Exporters of HV Fuses, 2012 (US\$ Thousands)

Table 41

The Top 25 Exporters of HV Circuit Breakers 1-72.5kV, 2012 (US\$ Thousands)

Table 42

The Top 25 Exporters of HV Circuit Breakers >72.5kV, 2012 (US\$ Thousands)

Table 43

The Top 25 Exporters of HV Switches, 2012 (US\$ Thousands)

Table 44

The Top 25 Exporters of Lightning Arresters, 2012 (US\$ Thousands)

Table 45

The Top 25 Exporters of Other HV Apparatus, 2012 (US\$ Thousands)

Table 46

The Top 25 Exporters of HV Distribution Boards and Panels, 2012 (US\$ Thousands)

7.2 TOP 25 IMPORTERS

Table 47

The Top 25 Importers of HV Switchgear, 2010 to 2012 (US\$ Millions)

Country	Av Value 2010 to 2012	Value 2012	% Total 2012

Source: Goulden Reports and United Nations

Table 48

The Top 25 Importers of HV Fuses, 2012 (US\$ Thousands)

Table 49

The Top 25 Importers of HV Circuit breakers 1 to 72.5kV, 2012 (US\$ Thousands)

Table 50

The Top 25 Importers of HV Circuit Breakers >72.5kV, 2012 (US\$ Thousands)

Table 51

The Top 25 Importers of HV Switches, 2012 (US\$ Thousands)

Table 52

The Top 25 Importers of HV Lightning Arresters, 2012 (US\$ Thousands)

Table 53

The Top 25 Importers of Other HV Apparatus, 2012 (US\$ Thousands)

Table 54

The Top 25 Importers of HV Distribution Boards and Panels, 2012 (US\$ Thousands)

Table 56

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
China – France, 2012 (US\$ Thousand)**

Table 57

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Germany - India, 2012 (US\$ Thousand)**

Table 58

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Italy – Korea South, 2012 (US\$ Thousand)**

Table 59

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Malaysia - Netherlands, 2012 (US\$ Thousand)**

Table 60

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Norway – Portugal, 2012 (US\$ Thousand)**

Table 61

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Singapore - Sweden, 2012 (US\$ Thousand)**

Table 62

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Switzerland - Turkey, 2012 (US\$ Thousand)**

Table 63

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
UK - USA, 2012 (US\$ Thousand)**

Table 65

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
China – France, 2012 (% by Value)**

Table 66

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Germany - India, 2012 (% by Value)**

Table 67

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Italy – Korea South, 2012 (% by Value)**

Table 68

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Malaysia - Netherlands, 2012 (% by Value)**

Table 69

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Norway – Portugal, 2012 ((% by Value)**

Table 70

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Singapore - Sweden, 2012 ((% by Value)**

Table 71

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
Switzerland - Turkey, 2012 ((% by Value)**

Table 72

**The Top 25 Exporters of HV Switchgear to Principal Destinations,
UK - USA, 2012 ((% by Value)**

7.5 IMPORT VALUES

Table 73

**Importers of HV Switchgear by Type,
2010 to 2012 Averaged (US\$ Thousands)**

Country	1	2	3	4	5	6	7	8
Afghanistan								
Albania								
Algeria								
Angola								
Argentina								
Armenia								
Australia								
Austria								
Azerbaijan								
Bahamas								
Bahrain								
Bangladesh								
Barbados								
Belarus								
Belgium								
Belize								
Benin								
Bermuda								
Bhutan								
Bolivia								

Source: Goulden Reports and United Nations

Key

1 = Fuses

2 = Circuit breakers 1 to 72.5kV

3 = Circuit breakers over 72.5kV

4 = Switches

5 = Lightning Arresters

6 = Other apparatus

7 = Distribution Boards & panels

8 = Total

Table 74
**Importers of HV Switchgear by Type,
 2010 to 2012 Averaged (US\$ Thousands)**

Country	1	2	3	4	5	6	7	8
Bosnia								
Botswana								
Brazil								
Brunei Darussalam								
Bulgaria								
Burkina Faso								
Burundi								
Cambodia								
Cameroon								
Canada								
Cen African Rep.								
Chad								
Chile								
China								
Hong Kong								
China, Macau								
Colombia								
Congo								
Congo Dem. Rep								
Costa Rica								

Source: Goulden Reports and United Nations

Key

1 = Fuses

2 = Circuit breakers 1 to 72.5kV

3 = Circuit breakers over 72.5kV

4 = Switches

5 = Lightning Arresters

6 = Other apparatus

7 = Distribution Boards & panels

8 = Total

Table 75

**Importers of HV Switchgear by Type,
2010 to 2012 Averaged (US\$ Thousands)**

Country	1	2	3	4	5	6	7	8
Cote d'Ivoire								
Croatia								
Cuba								
Cyprus								
Czech Republic								
Denmark								
Djibouti								
Dominica								
Dominican Republic								
Ecuador								
Egypt								
El Salvador								
Equatorial Guinea								
Eritrea								
Estonia								
Ethiopia								
Fiji								
Finland								
France								
French Polynesia								

Source: Goulden Reports and United Nations

Key

1 = Fuses

2 = Circuit breakers 1 to 72.5kV

3 = Circuit breakers over 72.5kV

4 = Switches

5 = Lightning Arresters

6 = Other apparatus

7 = Distribution Boards & panels

8 = Total

Table 76
**Importers of HV Switchgear by Type,
 2010 to 2012 Averaged (US\$ Thousands)**

Country	1	2	3	4	5	6	7	8
Gabon								
Gambia								
Georgia								
Germany								
Ghana								
Greece								
Guatemala								
Guinea								
Guinea Bissau								
Guyana								
Haiti								
Honduras								
Hungary								
Iceland								
India								
Indonesia								
Iran								
Iraq								
Ireland								
Israel								

Source: Goulden Reports and United Nations

Key

1 = Fuses

2 = Circuit breakers 1 to 72.5kV

3 = Circuit breakers over 72.5kV

4 = Switches

5 = Lightning Arresters

6 = Other apparatus

7 = Distribution Boards & panels

8 = Total

Table 77

**Importers of HV Switchgear by Type,
2010 to 2012 Averaged (US\$ Thousands)**

Country	1	2	3	4	5	6	7	8
Nepal								
Netherlands								
Neth. Antilles								
New Caledonia								
New Zealand								
Nicaragua								
Nigeria								
Norway								
Oman								
Pakistan								
Peru								
Philippines								
Poland								
Portugal								
Qatar								
Romania								
Russia								
Rwanda								
Saint Lucia								
Saudi Arabia								

Source: Goulden Reports and United Nations

Key

1 = Fuses

2 = Circuit breakers 1 to 72.5kV

3 = Circuit breakers over 72.5kV

4 = Switches

5 = Lightning Arresters

6 = Other apparatus

7 = Distribution Boards & panels

8 = Total

Table 78
**Importers of HV Switchgear by Type,
 2010 to 2012 Averaged (US\$ Thousands)**

Country	1	2	3	4	5	6	7	8
Malaysia								
Mali								
Malta								
Mauritania								
Mauritius								
Mexico								
Moldova								
Mongolia								
Morocco								
Mozambique								
Myanmar								
Nepal								
Netherlands								
Neth. Antiles								
New Cal'nia								
New Zealand								
Nicaragua								
Niger								
Nigeria								
Norway								

Source: Goulden Reports and United Nations

Key

1 = Fuses

2 = Circuit breakers 1 to 72.5kV

3 = Circuit breakers over 72.5kV

4 = Switches

5 = Lightning Arresters

6 = Other apparatus

7 = Distribution Boards & panels

8 = Total

Table 79

**Importers of HV Switchgear by Type,
2010 to 2012 Averaged (US\$ Thousands)**

Country	1	2	3	4	5	6	7	8
Oman								
Pakistan								
Panama								
Papua New Guinea								
Paraguay								
Peru								
Philippines								
Poland								
Portugal								
Puerto Rico								
Qatar								
Romania								
Russia								
Rwanda								
Saint Lucia								
Samoa								
Saudi Arabia								
Senegal								
Serbia								
Seychelles								

Source: Goulden Reports and United Nations

Key

1 = Fuses

2 = Circuit breakers 1 to 72.5kV

3 = Circuit breakers over 72.5kV

4 = Switches

5 = Lightning Arresters

6 = Other apparatus

7 = Distribution Boards & panels

8 = Total

Table 80
**Importers of HV Switchgear by Type,
 2010 to 2012 Averaged (US\$ Thousands)**

Country	1	2	3	4	5	6	7	8
Sierra Leone								
Singapore								
Slovakia								
Slovenia								
Somalia								
South Africa								
Spain								
Sri Lanka								
Sudan								
Suriname								
Sweden								
Switzerland								
Syria								
Taiwan								
Tajikistan								
Tanzania								
Thailand								
Togo								
Tonga								
Trinidad & Tobago								

Source: Goulden Reports and United Nations

Key

1 = Fuses

2 = Circuit breakers 1 to 72.5kV

3 = Circuit breakers over 72.5kV

4 = Switches

5 = Lightning Arresters

6 = Other apparatus

7 = Distribution Boards & panels

8 = Total

Table 81

**Importers of HV Switchgear by Type,
2010 to 2012 Averaged (US\$ Thousands)**

Country	1	2	3	4	5	6	7	8
Tunisia								
Turkey								
Turkmenistan								
Uganda								
UK								
Ukraine								
UAE								
Uruguay								
USA								
Uzbekistan								
Vanuatu								
Venezuela								
Vietnam								
Yemen								
Zambia								
Zimbabwe								
World Total								

Source: Goulden Reports and United Nations

Key

1 = Fuses

2 = Circuit breakers 1 to 72.5kV

3 = Circuit breakers over 72.5kV

4 = Switches

5 = Lightning Arresters

6 = Other apparatus

7 = Distribution Boards & panels

8 = Total

7.6 IMPORT VALUES

7.6.1 HV Switchgear Imports by Country Alphabetical 2012

Table 82

Imports of HV Switchgear, by Country, Albania - Antigua
2012 (US\$ Thousand)

	Albania		Algeria		Antigua & Barbuda
Italy					
China					
Germany					
Greece					
France					
Bulgaria					
Austria					
Spain					
Macedonia					
Turkey					
Hungary					
Canada					
Croatia					
Czech Rep.					
Switzerland					
Netherlands					
USA					
UK					
Mexico					
Sweden					
Others					
Total					

Source: Goulden Reports and United Nations

Table 83

**Imports of HV Switchgear, by Country, Argentina - Aruba
2012 (US\$ Thousand)**

Table 84

**Imports of HV Switchgear, by Country, Australia - Azerbaijan
2012 (US\$ Thousand)**

Table 85

**Imports of HV Switchgear, by Country, Bahamas - Barbados
2012 (US\$ Thousand)**

Table 86

**Imports of HV Switchgear, by Country, Belarus - Belize
2012 (US\$ Thousand)**

Table 87

**Imports of HV Switchgear, by Country, Bermuda - Bolivia
2012 (US\$ Thousand)**

Table 88

**Imports of HV Switchgear, by Country, Bosnia - Brazil
2012 (US\$ Thousand)**

Table 89

**Imports of HV Switchgear, by Country Bosnia - Brazil
2012 (US\$ Thousand)**

Table 90

**Imports of HV Switchgear, by Country, Cambodia - Canada
2012 (US\$ Thousand)**

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Table 91

**Imports of HV Switchgear, by Country, Vietnam - Zimbabwe
2012 (US\$ Thousand)**

7.6.2 HV Switchgear Imports by Region, by Country 2008 to 2012

Table 92

**Imports of HV Switchgear, Western Europe, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Austria					
Belgium					
Cyprus					
Denmark					
Finland					
France					
Germany					
Greece					
Iceland					
Ireland					
Italy					
Luxembourg					
Malta					
Netherlands					
Norway					
Portugal					
Spain					
Sweden					
Switzerland					
UK					
Total					

Source: Goulden Reports and United Nations

Table 93

**Imports of HV Switchgear, Eastern Europe, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Albania					
Bosnia					
Bulgaria					
Croatia					
Czech Republic					
Hungary					
Macedonia					
Poland					
Romania					
Serbia					
Slovakia					
Slovenia					
Total					

Source: Goulden Reports and United Nations

Table 94

**Imports of HV Switchgear, Former Soviet Union, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Armenia					
Azerbaijan					
Belarus					
Estonia					
Georgia					
Kazakhstan					
Kyrgyzstan					
Latvia					
Lithuania					
Moldova					
Russia					
Tajikistan					
Turkmenistan					
Ukraine					
Uzbekistan					
Total					

Source: Goulden Reports and United Nations

Table 95
Imports of HV Switchgear, North Africa, by Country,
2008 to 2012 Values (US\$ Thousand)

Country	2008	2009	2010	2011	2012
Algeria					
Egypt					
Libya					
Morocco					
Tunisia					
Total					

Source: Goulden Reports and United Nations

Table 96

**Imports of HV Switchgear, Western Africa, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Benin					
Burkina Faso					
Cameroon					
Cote d'Ivoire					
Equatorial Guinea					
Gabon					
Gambia					
Ghana					
Guinea					
Guinea Bissau					
Liberia					
Mali					
Mauritania					
Nigeria					
Senegal					
Sierra Leone					
Togo					
Total					

Source: Goulden Reports and United Nations

Table 97

**Imports of HV Switchgear, Central Africa, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Central African Rep.					
Chad					
Congo					
Congo Dem. Rep (Zaire)					
Niger					
Total					

Source: Goulden Reports and United Nations

Table 98

**Imports of HV Switchgear, East Africa, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Burundi					
Djibouti					
Eritrea					
Ethiopia					
Kenya					
Madagascar					
Mauritius					
Rwanda					
Somalia					
Sudan					
Tanzania					
Uganda					
Total					

Source: Goulden Reports and United Nations

Table 99

**Imports of HV Switchgear, Southern Africa, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Angola					
Botswana					
Malawi					
Mozambique					
South Africa					
Zambia					
Zimbabwe					
Total					

Source: Goulden Reports and United Nations

Table 100

**Imports of HV Switchgear, Middle East, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Bahrain					
Iran					
Iraq					
Israel					
Jordan					
Kuwait					
Lebanon					
Oman					
Qatar					
Saudi Arabia					
Syria					
Turkey					
United Arab Emirates					
Yemen					
Total					

Source: Goulden Reports and United Nations

Table 101

**Imports of HV Switchgear, Indian Sub-Continent, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Afghanistan					
Bangladesh					
Bhutan					
India					
Nepal					
Pakistan					
Seychelles					
Sri Lanka					
Total					

Source: Goulden Reports and United Nations

Table 102

**Imports of HV Switchgear, Asia, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Brunei Darussalam					
Cambodia					
China					
China, Hong Kong					
China, Macau					
Indonesia					
Japan					
Korea, North					
Korea, South					
Laos					
Malaysia					
Mongolia					
Myanmar					
Philippines					
Singapore					
Taiwan					
Thailand					
Vietnam					
Total					

Source: Goulden Reports and United Nations

Table 103

**Imports of HV Switchgear, South America, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Argentina					
Bolivia					
Brazil					
Chile					
Colombia					
Ecuador					
Guyana					
Paraguay					
Peru					
Suriname					
Uruguay					
Venezuela					
Total					

Source: Goulden Reports and United Nations

Table 104

**Imports of HV Switchgear, C America & Caribbean, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Bahamas					
Barbados					
Belize					
Bermuda					
Costa Rica					
Cuba					
Dominica					
Dominican Republic					
El Salvador					
Guatemala					
Haiti					
Honduras					
Jamaica					
Netherlands Antiles					
Nicaragua					
Panama					
Puerto Rico					
Saint Lucia					
Trinidad & Tobago					
Total					

Source: Goulden Reports and United Nations

Table 105

**Imports of HV Switchgear, North America, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Canada					
Mexico					
USA					
Total					

Source: Goulden Reports and United Nations

Table 106

**Imports of HV Switchgear, Australasia, by Country,
2008 to 2012 Values (US\$ Thousand)**

Country	2008	2009	2010	2011	2012
Australia					
Fiji					
French Polynesia					
New Caledonia					
New Zealand					
Papua New Guinea					
Samoa					
Tonga					
Vanuatu					
Total					

Source: Goulden Reports and United Nations

8. APPENDICES

8.1 EXCHANGE RATES

Table 107

Exchange Rates for Major Currencies against US Dollar 2008-2013

Currency	2008*	2009*	2010*	2011*	2012*	2013*
Argentinean Peso	3.17	3.72	3.90	4.12	4.53	5.46
Australian Dollar	1.19	1.28	1.09	0.97	0.97	1.04
Brazilian Real	1.84	1.99	1.75	1.67	1.95	2.16
British Pound	0.55	0.64	0.65	0.62	0.63	0.64
Canadian Dollar	1.10	1.14	1.03	0.99	1.00	1.03
Chinese Yuan	6.96	6.82	6.76	6.46	6.30	6.19
Czech Koruna	17.10	19.00	19.07	17.66	19.54	19.54
Danish Kroner	5.10	5.35	5.62	5.36	5.79	5.62
Egyptian Pound	5.49	5.51	5.59	5.92	6.03	6.84
Euro	0.68	0.72	0.75	0.72	0.78	0.75
Hong Kong Dollar	7.79	7.75	7.77	7.78	7.76	7.76
Indian Rupee	43.82	48.42	45.72	46.84	53.45	58.49
Indonesian Rupiah	9,684.9	10,387.2	9,056.7	8,724.7	9,328.0	10,397.6
Israeli Shekel	3.59	3.92	3.73	3.57	3.85	3.61
Japanese Yen	103.47	93.58	87.78	79.72	79.78	97.71
Malaysian Ringgit	3.34	3.51	3.21	3.05	3.08	3.14
Mexican Peso	11.17	13.48	12.63	12.42	13.15	12.75
New Zealand Dollar	1.43	1.60	1.39	1.26	1.23	1.22
Nigerian Nair	120.19	148.30	149.30	154.24	157.54	157.75
Norwegian Kroner	5.65	6.28	6.04	5.60	5.82	5.88
Polish Zloty	2.41	3.11	3.01	2.96	3.25	3.16
Russian Rouble	24.87	31.63	30.31	29.33	30.98	31.84
Saudi Riyal	3.76	3.75	3.74	3.75	3.75	3.75
South African Rand	8.28	8.40	7.30	7.23	8.20	9.65
South Korean Won	1,102.8	1,272.7	1,153.3	1,105.8	1,123.0	1,091.1
Swedish Kroner	6.59	7.64	7.20	6.49	6.77	6.51
Swiss Franc	1.08	1.09	1.04	0.89	0.94	0.93
Taiwanese Dollar	31.56	33.01	31.52	29.26	29.49	29.65
Thai Baht	33.27	34.08	31.51	30.30	30.91	30.64
Turkish Lira	1.31	1.55	1.51	1.68	1.80	1.91

*Average rates January to December
Source: OANDA and Goulden Reports

8.2 ESTIMATED PRODUCTION BY COMPANY BY COUNTRY

The estimates below are a second attempt to complete such an analysis worldwide. As with the first edition Reports would welcome any feedback, amendments and corrections to this table.

Table 108

Estimated production by Country by Company-2012 (US\$ Million)

Country	Company	2012 Production US\$ Million
WESTERN EUROPE		
Austria	Siemens Others	
Belgium		
Denmark		
Finland		
France		
Germany		
Greece		

continued.....

Ireland	31
Italy	
Netherlands	
Norway	
Portugal	
Spain	
Sweden	
Switzerland	
United Kingdom	

NORTH AMERICA
Canada
Mexico
USA
AUSTRALASIA
Australia
New Zealand
World

Source: Goulden Reports Estimates



9. COUNTRY PROFILES BY REGION

9.1 Western Europe

Table 109

W Europe – Country by Country Profiles

Country	Country Area (Sq.Km)	Population (Thousands) 2012	GDP (US\$ Millions) 2012	GDP per Capita (US\$) 2012	Load (GWh) 2010	Average Load (kWh/Capita) 2010	Installed Capacity MW 2010	Transmission cctkm 2010	Distribution cctkm 2010	Low Voltage cctkm 2010
Austria	83,859	8,429	391,469	46,443	63,801	7,569	21,114	13,286	73,140	73,396
Belgium	30,519	10,788	476,796	44,197	84,681	7,850	18,322	7,217	82,562	94,919
Cyprus	9,251	1,129	22,446	19,881	4,794	4,246	1,527	985	3,141	8,139
Denmark	43,094	5,593	309,180	55,280	33,562	6,001	13,707	6,741	70,551	113,509
Finland	338,145	5,403	247,189	45,750	84,827	15,700	16,678	16,484	77,491	84,773
France	551,500	63,458	2,580,423	40,663	470,953	7,421	124,270	72,873	734,913	693,869
Germany	356,733	81,991	3,366,651	41,061	549,119	6,697	153,224	135,816	560,427	1,013,395
Greece	131,957	11,419	254,978	22,329	56,401	4,939	15,117	10,415	96,214	95,703
Iceland	103,000	328	13,554	41,323	16,234	49,494	2,579	1,935	8,323	6,269
Ireland	70,284	4,579	204,710	44,706	25,182	5,500	8,316	7,103	161,194	52,172

Source: Goulden Reports

Table 110

Australasia – Country by Country Profiles

Country	Country Area (Sq.Km)	Population (Thousands) 2012	GDP (US\$ Millions) 2012	GDP per Capita (US\$) 2012	Load (GWh) 2010	Average Load (kWh/Capita) 2010	Installed Capacity MW 2010	Transmission cctkm 2010	Distribution cctkm 2010	Low Voltage cctkm 2010
Australia	7,741,220	22,919	1,542,055	67,283	213,538	9,317	59,134	36,960	252,210	273,306
Fiji	18,274	876	3,946	4,505	808	923	245	551	2,881	3,907
New Caledonia	18,575	259	0	0	1,840	7,102	499	242	2,547	4,141
New Zealand	270,534	4,461	166,923	37,418	40,765	9,138	9,679	5,627	36,125	39,483
Papua New Guinea	462,840	7,170	15,393	2,147	3,116	435	700	2,315	32,057	9,779
Australasia	8,511,443	35,685	1,728,317	48,433	260,066	7,288	70,257	45,695	325,820	330,615

Source: Goulden Reports

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