

The European & the FSU Markets for High Voltage Switchgear 2012 - 2022

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Abstracts

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.

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About

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 ** to **% cagr – roughly half the rates experienced up to 2008.

The supplier base continues to evolve in reaction to the markets. ABB 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 *****%. Siemens is second at a little over *****% and Alstom remains in third place as the amalgamation of the old Areva T&D business into Alstom and Schneider (HV and MV parts respectively) unfolds. The Alstom share of the global market has settled at about *****% but the Schneider share which we originally estimated at *****% has now increased to over 6%. How much is due to their increased market penetration and how much is due to the distribution switchgear sector increasing is not clear.

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.

The current (as at the time of going to press) uncertainty as to which suitor will be successful in the acquisition of the Alstom Grid business is still playing out.

With respect to HV Switchgear, a glance at table 21 shows the overall position. ABB are top of the league with *****% share, GE + Alstom Grid will result in a combined share in the order of *****%; which places the combined business in third place behind Siemens. A combination of Siemens + Mitsubishi + Alstom Grid; gives a combined share in the order of *****%. In reality this would net down to much less than that because of the large areas (geographically and product) of overlap within the combined group; particularly between Siemens and Alstom Grid in Europe. GE on the other hand appears to be a much better fit both product-wise and from a geographical perspective. No doubt money rather than logic will decide; all of which will be reported in the next edition of this report.

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