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California Distribution Transformers Market Outlook and Projections, 2019-2027

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Abstracts

The California's transmission and distribution (T&D) network is an interconnection of generation facilities, high voltage (HV) transmission lines, substations, and low voltage (LV) distribution lines, along with the other states in the country. It has a significant vast infrastructure consisting of numerous miles of HV transmission and distribution cables serving a large array of consumers.

Over the past few years, there have been considerable amount of investments by the US, in order to expand, replace, and upgrade the existing T&D infrastructure across few states in the country, namely California, Florida, Texas, New York, and Washington. This can be primarily attributed to aging and inadequate T&D infrastructure. In addition, certain other factors such as increasing demand for reliable power delivery systems, regulations, and focus on renewable energy production are also anticipated to drive the investments pertaining to T&D infrastructure of the country.

Recently, the power industry in California has witnessed two major transformations, one is due to the shift from conventional sources of energy to the renewable resources and the second is due to a shift from highly centralized power system to a decentralized system. The centralized system was mainly concerned with large remote generating plants, whereas the decentralized system involved technological advances and customer adoption pertaining to distributed energy resources (DERs).

The US has some of the major global distribution transformer manufacturers. There are more than 100 manufacturers and importers of distribution transformers operating in the US. Out of these, only the major manufacturers such as ABB, General Electric, Eaton, and a few others represent more than 50% of the dry-type and liquid-immersed transformer market. Some of the major manufacturers for the liquid-immersed

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transformers in the US are ABB, Cooper Power Systems, ERMCO, and General Electric. On the other hand, major manufacturers for dry-type transformers include ABB, Acme Electric Corporation (Hubbell), and Eaton. These companies account for more than half of the total revenue generated via sales for both the type of transformers across different states.

The US Department of Energy (DOE) is an authority responsible for energy conservation standards for distribution transformers for all of the US states. Some of the major authorities in the country to oversee T&D infrastructure in some states include California ISO (CAISO), Electric Reliability Council of Texas (ERCOT), ISO New England (ISO-NE), Midcontinent ISO (MISO), and New York ISO (NYISO).

Installation of more efficient and reliable transformers in the US is expected to aid in generation of large energy in tandem with some monetary savings. Additionally, adoption of more advanced and efficient technology pertaining to different operational characteristics of the transformers is also anticipated to result in the generation of more power.

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