

Worldwide Study Of The Protective Relay Marketplace In Electric Utilities: 2009-2011

VOLUME III : MARKET ASSESSMENT AND OUTLOOK

TABLE OF CONTENTS

Introduction	3
Generator Protection Sample	5
Transmission Line Sample	6
Distribution Line Sample	7
Substation Sample	8
Transformer Sample	8
Motor Protection Sample	9
Industry Operated Substation Sample	10
Trends and Observations on the North American Relay Market	11
Accompanying North American Market Share Charts	14
North American Factory Shipments of Protective Relays by Type of Relay	15
North American Factory Shipments of Protective Relays by Market Segment	16
North American Factory Shipments of Protective Relays by Protective Relay Application	17
North American Factory Shipments of Protective Relays by North American Relay Manufacturers	18
Global Factory Shipments of Protective Relays	19
Supplier Profile Overview of the Protective Relay Marketplace	20
Global Protective Relay Market Information and Size Estimates	23

Introduction

This report, the third volume of a four-volume series, is based on a March-June 2009 survey-based study of key worldwide electric utility relay engineers and managers of systems protection and control. Officials from 30 countries participated in the study. Supplementary studies were conducted regarding the investment outlook for protection and control activities in December 2008 and again in June 2009. More than 135 utility managers discussed their latest investment plans for protection and control.

Volume III, the market assessment and outlook for protective relays, provides information on generator protection, transmission line, distribution feeder, transformer, and motor protection relays.

Descriptions of the domestic and international protective relay market shares are provided, accompanied by tables and charts.

The estimates and forecasts contained in this report are based on four sources of information:

- 1) Utility surveys of about 150 mostly large utilities in 30+ countries**
- 2) Manufacturer surveys of key protective relay suppliers and financial information obtained about and/or from suppliers.**
- 3) Economic information from a variety of public sector and private sector sources**
- 4) Surveys of Electric Power officials regarding the impact of the current recession on CAPEX and O&M Investment for protection and control.**

Other volumes in this research series on protective relays include:

Volume I: North American Utilities

Volume II: International Utilities

Volume IV: Supplier Profiles – Relay Manufacturers