



CANADA: ENERGY SECTOR

POWER-GEN; ELECTRICAL POWER SYSTEMS

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MARKET OVERVIEW- MARCH 2015

- Canadian real GDP growth for 2014 was approximately 2%; 2015 GDP growth is expected to be slightly better
- Total installed generating capacity is currently 134 GW; projected to reach 170 GW in 2035
- Electricity generation 2013 by sources: hydro 63.5%, gas/combustion 19%, nuclear 16%, renewables (wind, solar) 1.5%
- Power generation based on coal was replaced with gas and renewable energy – wind/solar
- 2014 total imports of equipment and components approximately US\$ 20.8 billion (47% from the U.S.)

OPPORTUNITIES - PROGRAMS/PROJECTS

- 80% of Canada's existing power-generation facilities to be replaced or modernized in the next 10 to 15 years
- Investment \$290 billion for 2010-2030, with \$ 195 billion in generation (per Conference Board of Canada)
- Total import value similar with total exports; high global integration
- Ongoing refurbishments and upgrades of power stations and substations
- Several nuclear reactor power generation units being refurbished
- Federal program- Clean Energy Fund: over \$200 million for R & D and demonstration projects
- Provincial Governments' programs
- Further cooperation for a safe, integrated, North American Smart Grid

BEST PROSPECTS

Total imports 2014 (All countries)

- Electric Generating Sets: \$ US 1,370 million (+8%)
- Boards & Panels for Breakers and Fuses: \$1,853 million (+9%)
- Electrical Lighting Equipment: \$US 1,219 million (+11%)
- Electrical Transformers, Static Convertors & Inductors: \$US 2,187 million (+7%)
- Many specific product groups and sub-groups with solid growth rates

EVENTS

- CanWEA Annual Conference 2015 – Toronto, ON, October 8, 2015
- Smart Grid Canada – Toronto, ON, October 2015
- Canadian Council for Public-Private Partnership Council – Toronto, ON, November 2015
- APPrO – Toronto, ON, November 2015
- PDAC – Toronto, ON, March 2016

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