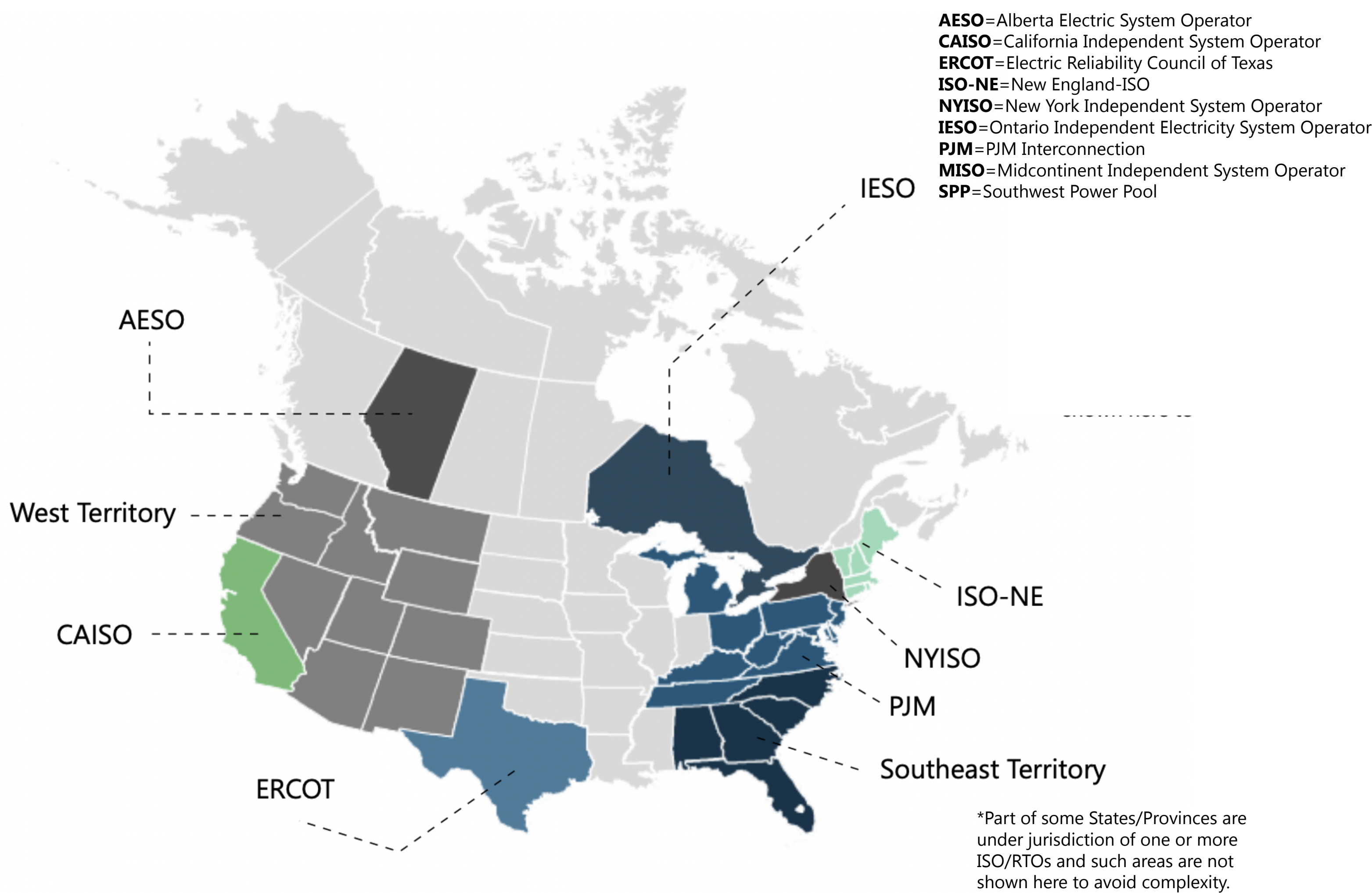
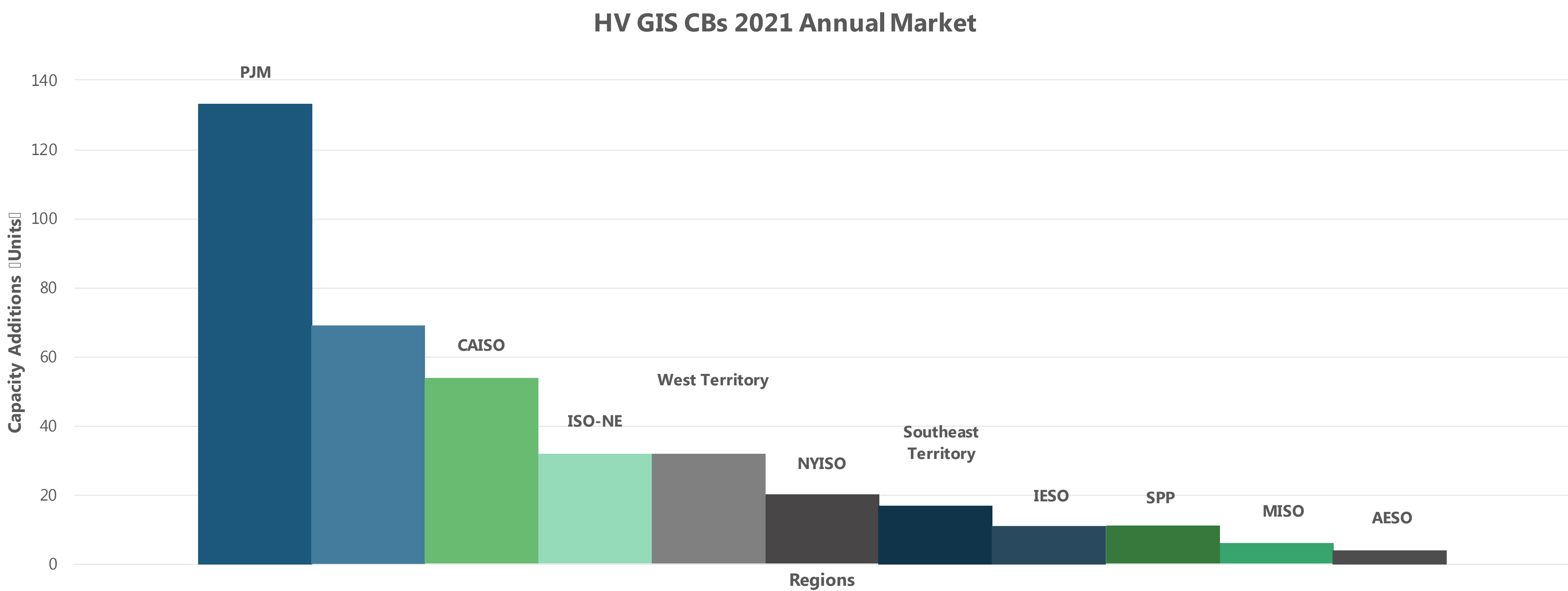


Hotspots for CBs in North America

- CBs are usually installed in southern/southeastern states due to comparatively warm climate throughout the year.
- High-impact, low-frequency events (such as tropical hurricanes) have been a frequent occurrence in this region in the recent past, which has created CB replacement opportunities.
- The highlighted states/provinces represent about 96% of the annual additions of CBs.



Regional Segmentation of CB Additions



- PJM had the highest additions of HV circuit breakers, followed by ERCOT and CAISO, representing 66% of the 2021 market additions.
- AIS CBs dominated the market; however, PJM had a relatively high occurrence of GIS CBs due to the prevalence of off-shore wind farms.

Voltage Segmentation of CB Additions

- Half of the annual market lies at 145 kV voltage level due to its wide use in the utility.
- GIS-based CBs installation at voltages greater than 245kV accounted for 14% of the total annual market.

