



INTERNATIONAL  
**TRADE**  
ADMINISTRATION

## SAUDI ARABIA: INVESTMENT AND OPPORTUNITY IN THE SMART GRID



***Webinar: Saudi Arabia's Electricity Markets and Opportunities  
in the Smart Grid and Energy Efficiency Sectors***  
January 31, 2012 – 12 pm EST

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# About the International Trade Administration

## Mission:

*Strengthen the competitiveness of U.S. industry, promote trade and investment, and ensure fair trade through the enforcement of our trade laws and agreements around the world.*

## 2012 Priority:

### National Export Initiative and Clean Tech:

- Increase access to credit
- Remove barriers to clean tech trade
- Improve coordination to enhance growth
- Enhance trade advocacy and export promotion



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# Saudi Arabia's Electricity Market

## Vital Stats:

- Population: 26.5 million (2011) -> 28.6 million (2020 predicted)
- Generation Capacity: 52 GW (2011)
- Peak Power Demand: 43 GW (2010) -> 120 GW (2030 predicted)

## Key Market, Regulatory, and Policy Organizations:

- Saudi Electric Company
  - 90% of KSA Power Gen
  - 6 Million Customers
  - 75% Government Owned
- Electricity and Co-Generation Regulatory Agency (ECRA)
- King Abdullah City for Atomic and Renewable Energy (KACARE)
- Ministry of Water and Electricity



# Electricity Demand Driving SEC Investments

**50%**

transmission  
network  
expansion  
since 2000.

**8%**

Transmission  
Network  
growth in  
2010 alone.

## Major 2010 Investments:

- Added 33 new substations
- 77 transmission transformers
- >19,000 distribution transformers.

Added >317,000 customers to  
distribution network in 2010.

Began smart meter deployment:  
12k in 2010 + 60k by 2013.

Source: Saudi Arabia Electric Company, *2011 Annual Report*.

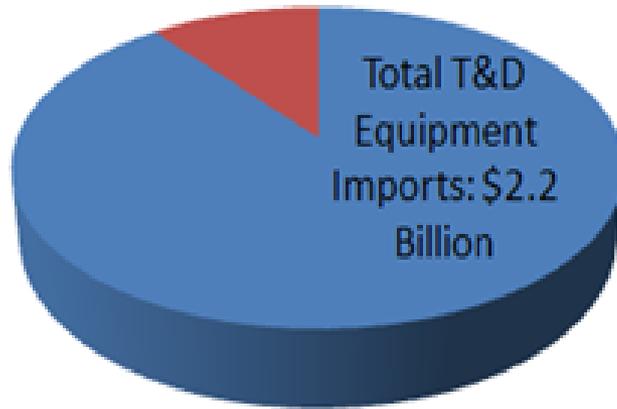


# State of KSA-USA Grid Equipment Trade

Saudi Arabia's transmission & distribution equipment imports grew at a 13% CAGR from 2000 to 2010.

12% U.S. market share in 2010:

Imports from  
United States:  
\$266.5 million



Source: U.S. Department of Commerce Census Bureau Data via the International Trade Commission's DataWeb Services

## U.S. T&D Equipment Manufacturers Top Export Markets, 2010:

- 1 Mexico
- 2 Canada
- 3 China
- 4 Germany
- 5 Korea
- 6 United Kingdom
- 7 Hong Kong
- 8 Japan
- 9 Dominican Republic
- 10 Singapore
- 11 France
- 12 Brazil
- 13 Saudi Arabia
- 14 Taiwan
- 15 Netherlands
- 16 Australia
- 17 India
- 18 Italy
- 19 United Arab Emirates
- 20 Malaysia



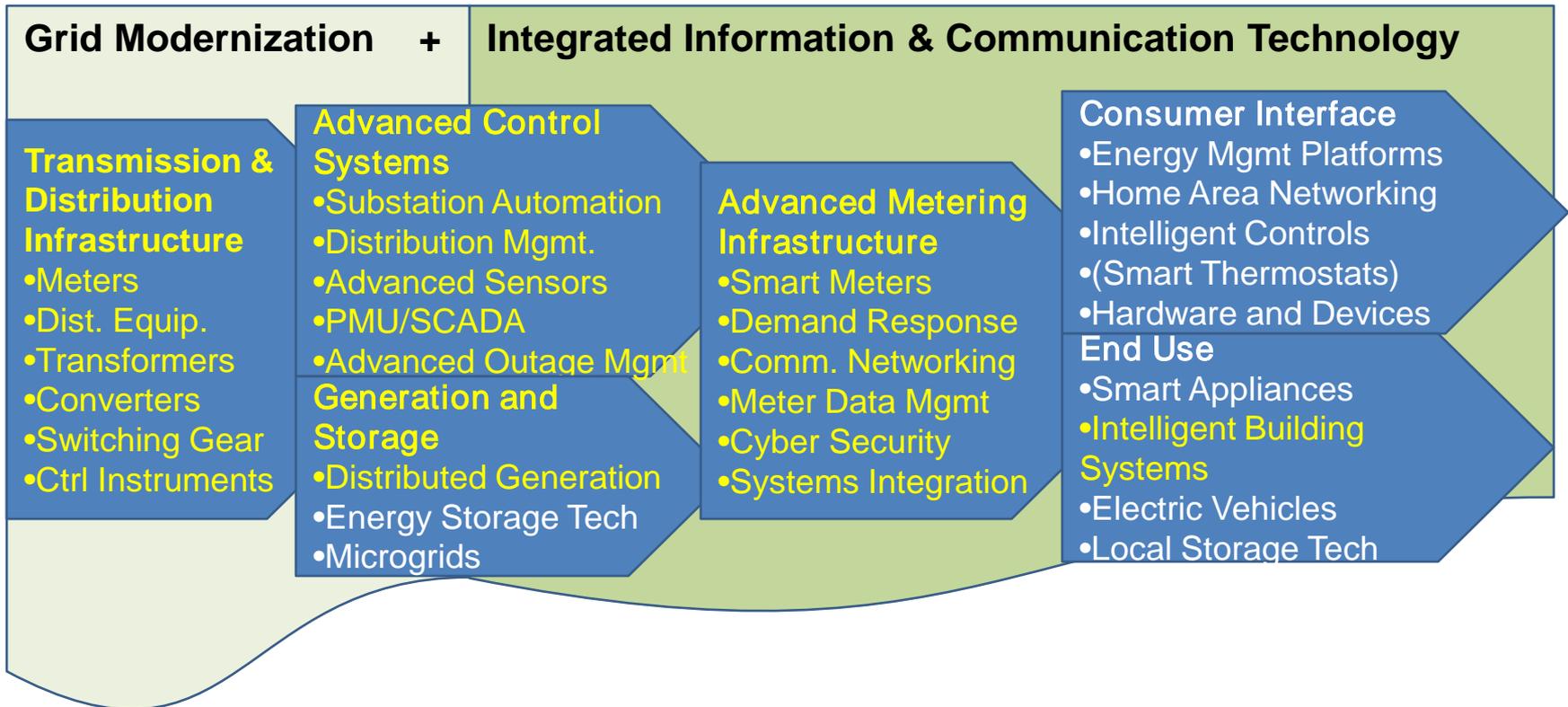
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# Export Opportunities to Saudi Arabia: Grid Modernization and Smart Grid Technologies and Services

## Saudi Arabia's Grid Infrastructure Investments:



<http://export.gov/reee/>



The screenshot shows the export.gov website interface. At the top, the logo "export.gov" is displayed with the tagline "Helping U.S. Companies Export". Navigation links include "Opportunities", "Solutions", "Locations", "FAQ", "Blog", and "Connect". A search bar is present in the top right corner. The main content area features a blue sidebar on the left with the text "U.S. RE&EE Companies: Find Buyers in Saudi Arabia" and a "View Full Story" button. The main content area on the right has a green header with Arabic calligraphy, followed by a photograph of two hands shaking. Below the photo, the text reads: "Saudi Arabia Clean Energy and Energy Efficiency Trade Mission Riyadh & Dhahran April 14-18, 2012". A small note at the bottom of the photo states: "Participating in an official U.S. industry delegation, rather than travelling to Saudi Arabia on their own, will enhance companies' ability to secure meetings."

**Renewable Energy & Energy Efficiency  
Exporter Portal**

Thank You

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