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INDUSTRY GUIDES

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WHAT ARE MARKETLINE INDUSTRY GUIDES?

Marketline Industry Guides are the perfect tool to enhance your understanding of a specific sector in a particular geographic region.

Our Industry Guides are a one-stop resource for insight into industries that operate at a regional level. They draw together key information from our individual Industry Profiles to present a broader take on industries and sectors.

Using the globally recognized Porter's Five Forces framework, our Industry Guides are concise, focused, and accurate to help you absorb key information quickly.

Each Industry Guide includes:

- Forecasts for the market
- Market value and volume information
- Industry segmentation
- Macroeconomic analysis
- Competitor analysis
- Leading company information

We do the work for you...

Profiling a broad range of industries and geographies, MarketLine is one of the most prolific publishers of business information in the market.

Our Industry Guides act as an essential starting point for industry analysis and are written by a team of expert analysts drawing on both primary and secondary research.

Example titles:

Mining:
Global Industry Guide

Chemical Manufacturing:
BRIC Industry Guide

HOW DID MARKETLINE GET THIS DATA?

MarketLine Industry Guides are written by our in-house analysts and prepared under an established methodology, tried and tested over 10 years.

With stringent checks and controls to capture and validate the accuracy of our data, you can be confident in MarketLine to deliver quality data and insights.

WHY CHOOSE MARKETLINE?

In an information-rich world, finding facts you can rely upon isn't always easy.

At MarketLine, we deliver accurate, up-to-date information on 300 industries and 150 countries as well as detailed profiles of over 2,500 companies.

By taking the chore out of business research, MarketLine gives you more time to focus on what really matters.

MarketLine offers:

- Concise, accessible insights
- Competitive pricing
- Extensive industry coverage
- Vast geographic spread
- Instant delivery
- 10 years' experience
- Current and informed data
- Great customer service

Get in touch

If you have a question or comment about MarketLine and our products, we'd love to hear from you. Please get in touch via one of the following channels:

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INDUSTRY GUIDES
SAMPLE PAGE

TABLE OF CONTENTS

INDUSTRY GUIDES
SAMPLE PAGE

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MARKET VALUE

The global banks sector grew by 3.3% in 2009 to reach a value of $90,436.5 billion.

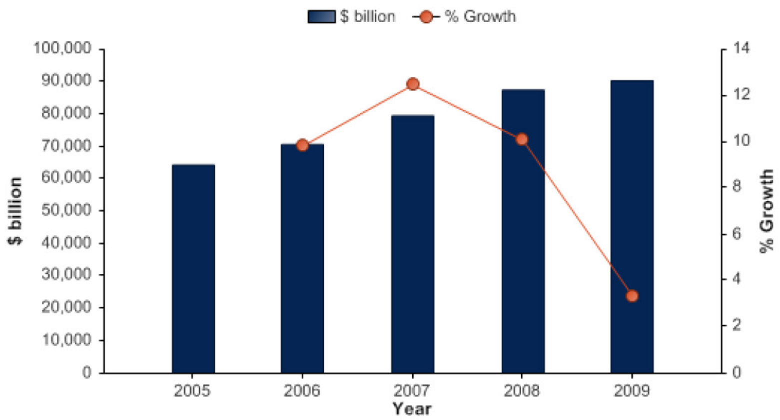
The compound annual growth rate of the sector in the period 2005–09 was 8.9%.

Table 1: Global banks sector value: $ billion, 2005–09

Year	$ billion	€ billion	% Growth
2005	64,349.8	46,277.8	
2006	70,678.6	50,829.2	9.8%
2007	79,494.3	57,169.2	12.5%
2008	87,510.6	62,934.2	10.1%
2009	90,436.5	65,038.4	3.3%
CAGR: 2005–09			**8.9%**

Source: Datamonitor **DATAMONITOR**

Figure 1: Global banks sector value: $ billion, 2005–09



Source: Datamonitor **DATAMONITOR**

INDUSTRY GUIDES
SAMPLE PAGE

MARKET SEGMENTATION I

Bank Credit is the largest segment of the global banks sector, accounting for 59.9% of the sector's total value.

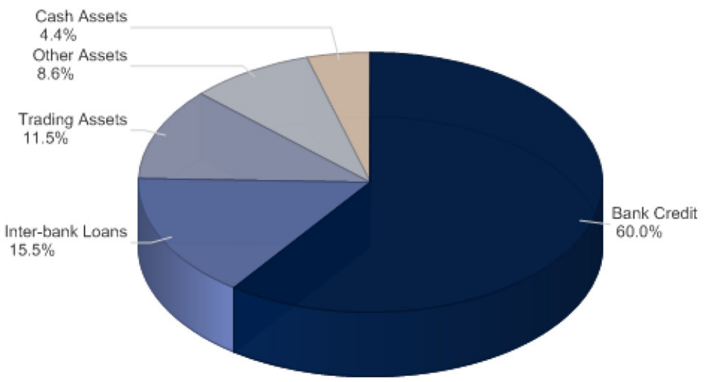
The inter-bank loans segment accounts for a further 15.5% of the sector.

Table 2: Global banks sector segmentation I:% share, by value, 2009

Category	% Share
Bank Credit	59.9%
Inter-bank Loans	15.5%
Trading Assets	11.5%
Other Assets	8.6%
Cash Assets	4.4%
Total	**100%**

Source: Datamonitor **DATAMONITOR**

Figure 2: Global banks sector segmentation I:% share, by value, 2009



Source: Datamonitor **DATAMONITOR**

INDUSTRY GUIDES
SAMPLE PAGE

MACROECONOMIC INDICATORS

Table 37: Japan size of population (million), 2005–09

Year	Population (million)	% Growth
2005	127.5	0.0%
2006	127.5	0.0%
2007	127.4	(0.1%)
2008	127.3	(0.1%)
2009	127.1	(0.2%)

Source: Datamonitor DATAMONITOR

Table 38: Japan gdp (constant 2000 prices, $ billion), 2005–09

Year	Constant 2000 Prices, $ billion	% Growth
2005	4,978.7	1.9%
2006	5,086.8	2.2%
2007	5,199.6	2.2%
2008	5,177.9	(0.4%)
2009	4,896.8	(5.4%)

Source: Datamonitor DATAMONITOR

Table 39: Japan gdp (current prices, $ billion), 2005–09

Year	Current Prices, $ billion	% Growth
2005	4,552.2	(1.2%)
2006	4,367.0	(4.1%)
2007	4,381.7	0.3%
2008	4,910.2	12.1%
2009	4,577.9	(6.8%)

Source: Datamonitor DATAMONITOR

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MarketLine Industry Guide

Power Generation

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EXECUTIVE SUMMARY

Market value

The global power generation sector grew by 10.7% in 2011 to reach a value of $1,141.8 billion.

Market value forecast

In 2016, the global power generation sector is forecast to have a value of $1,773.4 billion, an increase of 55.3% since 2011.

Market volume

The global power generation sector grew by 3.6% in 2011 to reach a volume of 18,624.9 TWh.

Market volume forecast

In 2016, the global power generation sector is forecast to have a volume of 23,071.6 TWh, an increase of 23.9% since 2011.

Category segmentation

Fossil Fuels (Conventional Thermal) is the largest segment of the global power generation sector, accounting for 67.7% of the sector's total volume.

Geography segmentation

Asia-Pacific accounts for 46.2% of the global power generation sector value.

Power Generationreference code

Power Generationreference codeTABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

GLOBAL POWER GENERATION

Market overview

Market analysis

The global power generation industry declined noticeably in 2009 but rebounded to return to growth in 2010. Further fairly strong growth is projected through to the end of the forecast period.

The global power generation industry is expected to generate total revenue of $1,141.8 billion in 2011, representing a compound annual growth rate (CAGR) of 2.9% between 2007 and 2011. In comparison, the European and Asia-Pacific industries will grow with CAGRs of 3.2% and 6.1% respectively, over the same period, to reach respective values of $240.3 billion and $527.6 billion in 2011.

Industry consumption volumes are forecast to increase with a CAGR of 2.4% between 2007-2011, to reach a total of 18,624.9 TWh in 2011. The industry's volume is expected to rise to 23,071.6 TWh by the end of 2016, representing a CAGR of 4.4% for the 2011-2016 period.

Fossil Fuels (Conventional Thermal) sales will have the highest volume in the global power generation industry in 2011, with total sales of 12,616.8 TWh, equivalent to 67.7% of the industry's overall volume. In comparison, sales of Renewable Energy are expected to reach a volume of 3,487.6 TWh in 2011, equating to 18.7% of the industry total.

The performance of the industry is forecast to accelerate, with an anticipated CAGR of 9.2% for the five-year period 2011 - 2016, which is expected to drive the industry to a value of $1,773.4 billion by the end of 2016. Comparatively, the European and Asia-Pacific industries will grow with CAGRs of 6% and 11.9% respectively, over the same period, to reach respective values of $321.1 billion and $926.7 billion in 2016