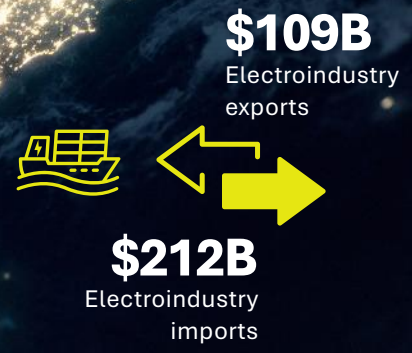
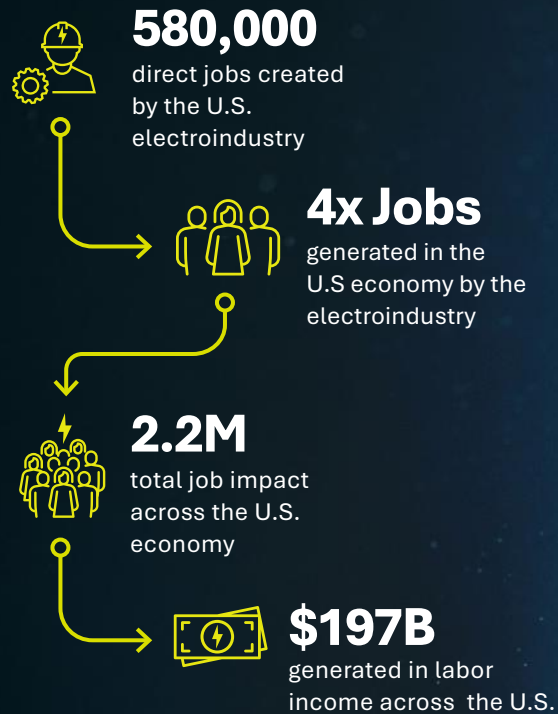
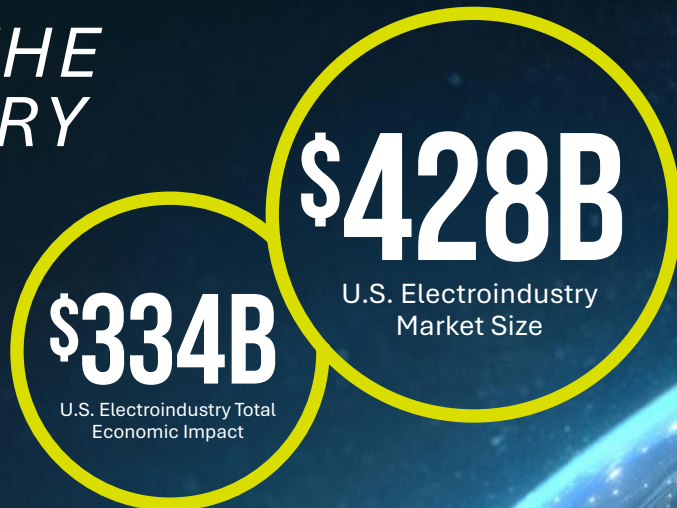


EXECUTIVE SUMMARY

2025 GUIDE TO THE ELECTROINDUSTRY

The electroindustry's economic impact, job creation, and national footprint

The electroindustry's economic impact represents more than 1% of total U.S. GDP and continues to grow, driven by AI adoption and electrification trends.

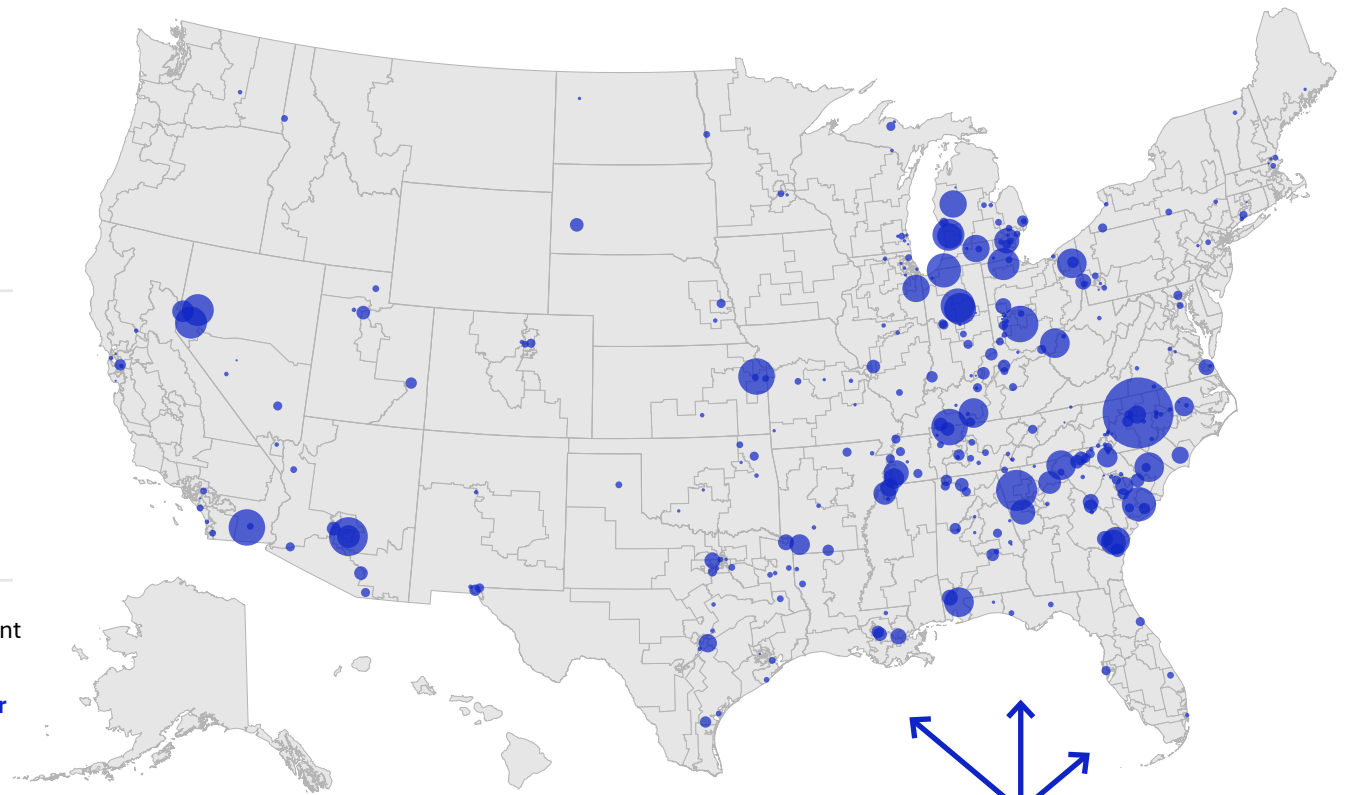


Electroindustry Investing Heavily in American Manufacturing

The electroindustry has invested over \$185 billion in the United States since 2018, with batteries accounting for a significant share.



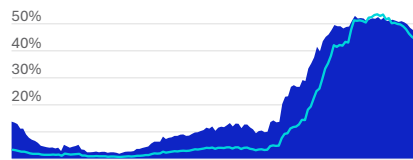
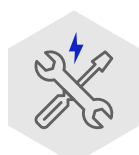
Investment Since 2018 (\$ Million)



Electroindustry manufacturers have invested substantially to produce equipment such as **transformers, switchgear, and power electronics** – critical to grid modernization and AI data centers.



Planned domestic capital investment in the electrical manufacturing industry may reach **\$60 billion over the next five years.***



The electrical sector accounts for **48% of U.S. manufacturing growth** as of August, 2025

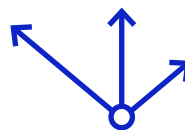
\$104B

in spending on manufacturing construction

\$82.1B

Invested in top 5 states

- \$18.8B North Carolina
- \$18.4B Georgia
- \$18.0B South Carolina
- \$13.6B Tennessee
- \$13.3B Michigan



\$185B

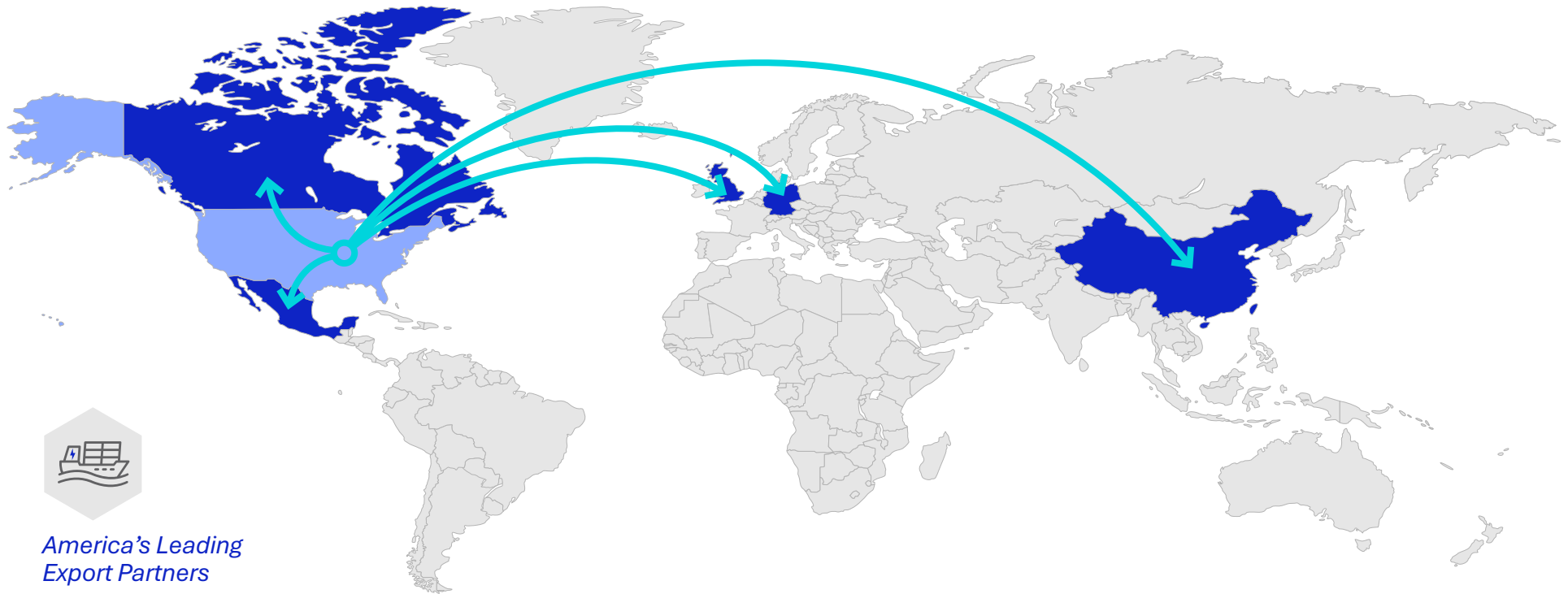
Invested across the U.S. since 2018

*Based on a survey of NEMA members conducted in Sept. 2025

Electroindustry Exports Surpass \$109B in 2024



Electroindustry Exports (\$ Billions)



America's Leading Export Partners

 **\$31.5B**
Mexico

Top 3 Exports by Sector

- Misc. Electrical Equipment Components
- Battery Manufacturing
- Current Carrying Wiring Devices

 **\$20B**
Canada

Top 3 Export Sectors

- Misc. Electrical Equipment Components
- Battery Manufacturing
- Motors & Generators

 **\$5.9B**
China

Top 3 Export Sectors

- Misc. Electrical Equipment Components
- Electricity Measuring/Testing Instruments
- Irradiation Apparatus

 **\$4.8B**
Germany

Top 3 Export Sectors

- Switchgear & Switchboard Apparatus
- Misc. Electrical Equipment Components
- Motors & Generators

 **\$3.2B**
United Kingdom

Top 3 Export Sectors

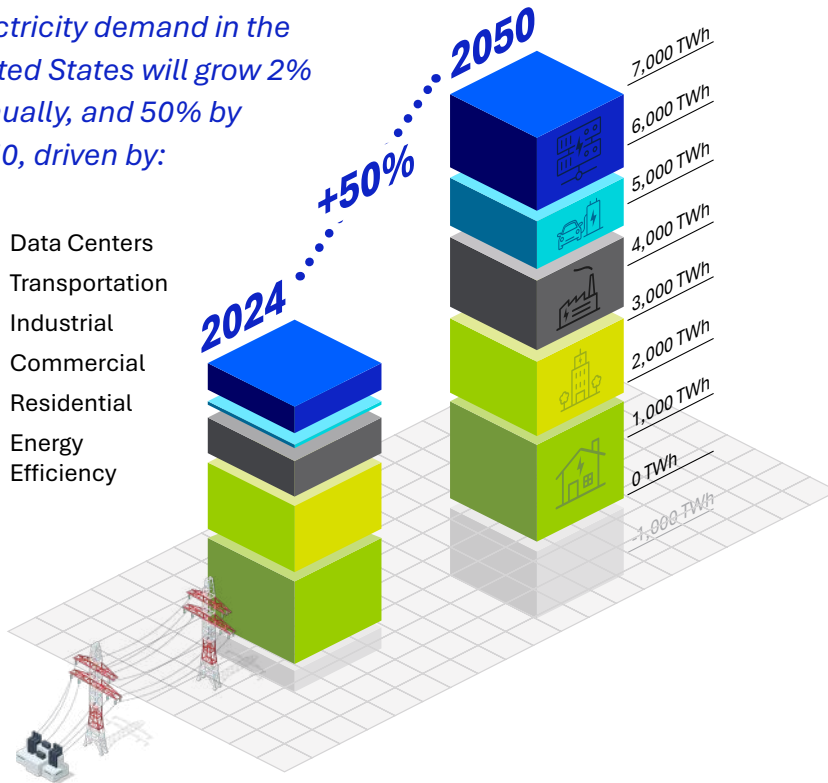
- Misc. Electrical Equipment Components
- Motors & Generators
- Relays & Industrial Controls

Electroindustry Meeting Rising Power Demand



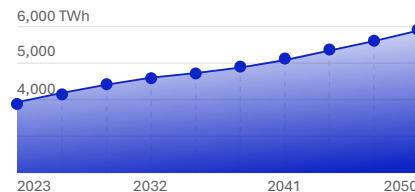
Electricity demand in the United States will grow 2% annually, and 50% by 2050, driven by:

- Data Centers
- Transportation
- Industrial
- Commercial
- Residential
- Energy Efficiency



33%

of typical AI Data Center build cost is electroindustry equipment



Electricity's share of final energy consumption expected to rise from 21% to **32% through 2050**

Technological solutions can help bridge the near-term gap between soaring electricity demand and constrained supply.

- Reconductoring of transmission lines
- Coordination of EV charging
- Deployment of stationary storage
- Deployment of digital substations
- Optimization of residential appliance usage
- Deployment of dynamic line rating technologies
- Optimization of data center electricity use
- Continued deployment of Advanced Metering Infrastructure (AMI)

But to fully realize tomorrow's flexible, resilient grid, industry manufacturers will also require consistent policy and regulatory clarity.

- All-of-the-above energy policies are recommended as a bridge to clean power
- Consistency in tax, trade, and supply chain policy are essential for stakeholders to make the necessary investments to fortify the grid and ensure electricity supply keeps pace with demand
- Permitting reform is vital to accelerating grid growth and securing returns on energy investment
- Workforce development is also a key policy priority for delivering a reliable grid