



# Changing Landscape in the Americas

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# Definitions

- 💡 **Americas: North, Central, and South America**
- 💡 **Region: The nine countries included in current outreach efforts:**
  - Colombia, Costa Rica, Dominican Republic, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Peru
- 💡 **Free trade negotiations are either completed or underway involving these countries and Canada, Mexico and United States.**

# Regional Trade Agreements

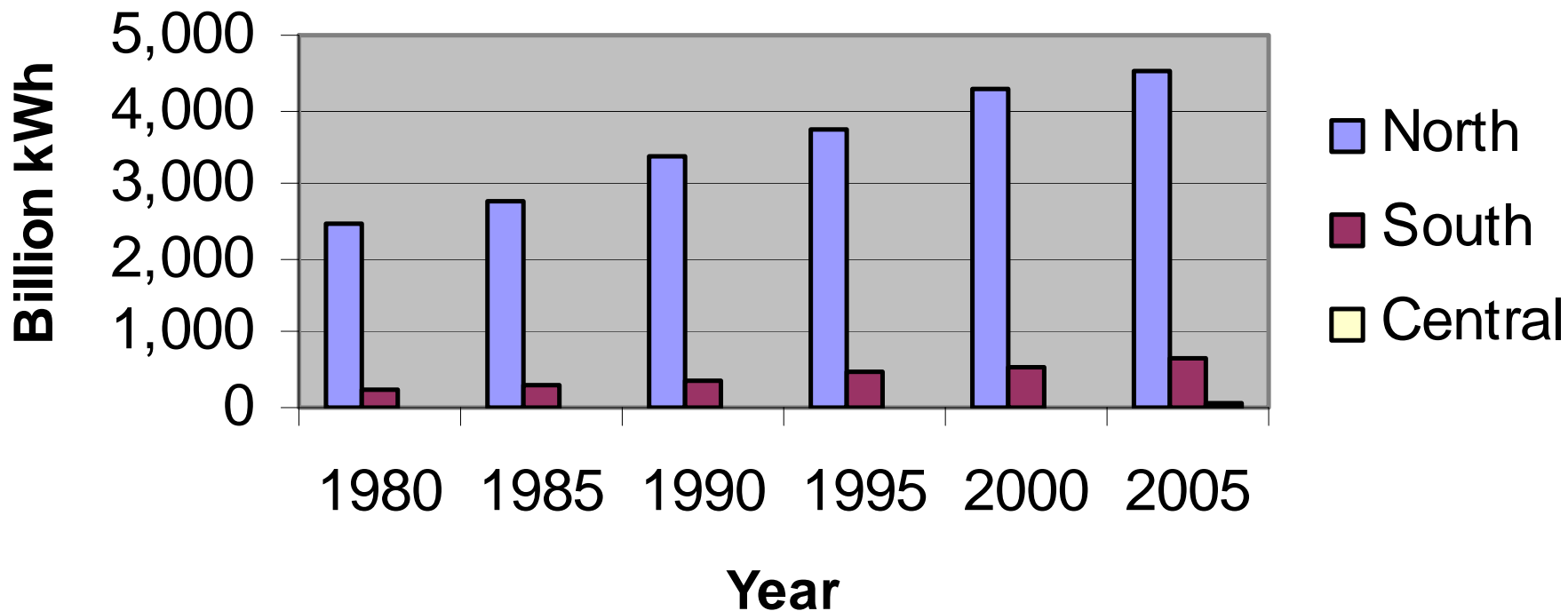
	Canada	Mexico	USA
Colombia	2	3	2
Costa Rica	3	3	3
Dominican Rep	1	3	3
El Salvador	1	3	3
Guatemala	1	3	3
Honduras	1	3	3
Nicaragua	1	3	3
Panama	1	3	2
Peru	3	3	3

1. Negotiating

2. Negotiations complete

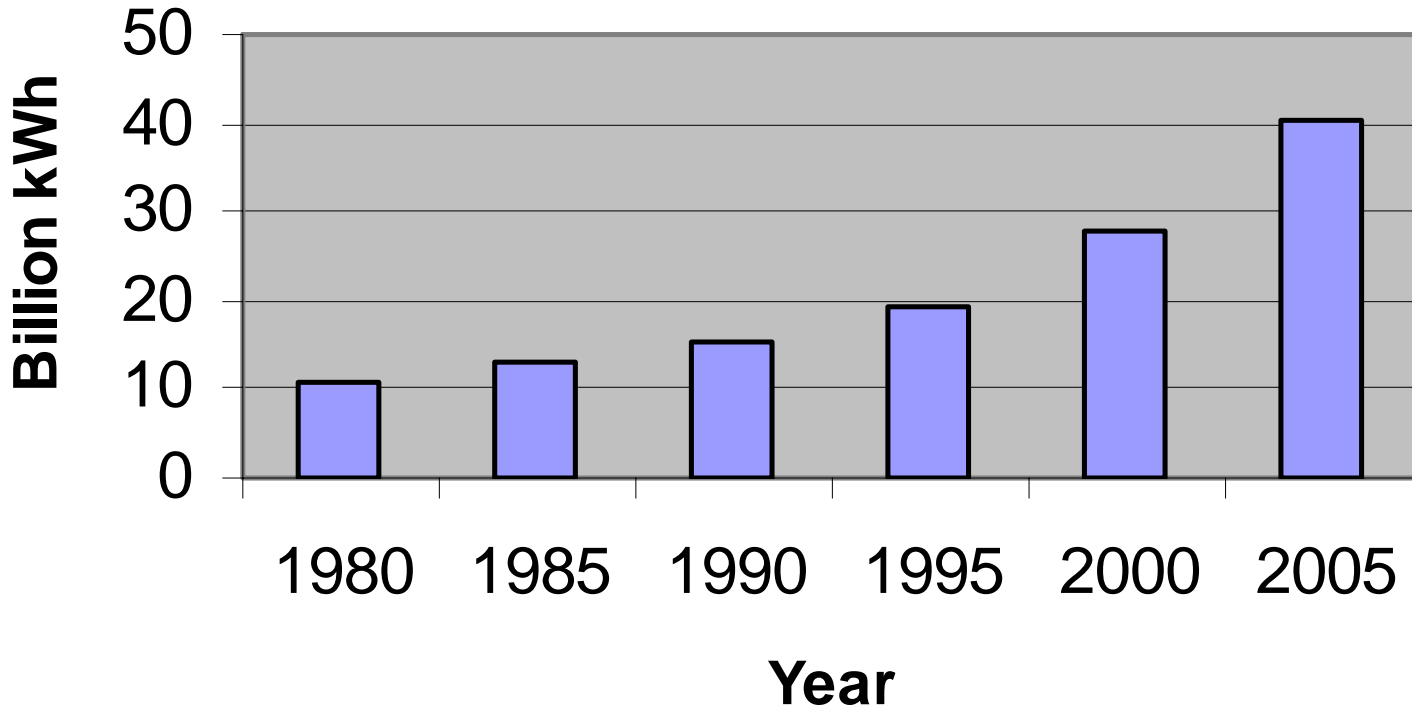
3. Fully Implemented

# Use of Electricity in the Americas





## Use of Electricity in the Region



## Per Capita Consumption, kWh

	<b>1990</b>	<b>2000</b>	<b>2005</b>	<b>Rate</b>
Nicaragua	308	349	439	43%
Guatemala	224	345	527	136%
Honduras	375	501	594	58%
El Salvador	368	644	645	75%
Peru	548	679	827	51%
Colombia	825	830	877	6%
Dominican Rep	394	757	1,065	170%
Panama	854	1,301	1,499	76%
Costa Rica	1,087	1,517	1,719	58%
Mexico	1,326	1,789	1,954	47%

# Source of Electrical Products

- 💡 Historically North American technology.
- 💡 Very little local production.
- 💡 EU sources increasing, especially resort areas.
- 💡 Growing Chinese presence.

# 2008 “Total Exports” NEMA Members’ Products

Country	First Quarter	Second Quarter	Third Quarter
	<i>In 1,000 Dollars</i>		
Dominican Rep	189,568	207,395	207,227
Colombia	78,316	81,804	76,189
Costa Rica	40,358	44,625	43,807
Peru	34,756	37,352	36,296
Guatemala	18,938	19,324	31,335
Honduras	27,803	31,167	26,786
Panama	19,882	15,695	21,048
El Salvador	8,504	12,789	14,255
Nicaragua	3,579	6,370	3,427
<b>Total</b>	<b>421,704</b>	<b>456,522</b>	<b>460,369</b>



# Product Channels

- 💡 Local distributors
- 💡 Global distributors
- 💡 Electrical hardware stores
  
- 💡 90% through electrical contractors
- 💡 10% do it yourself (diy)

# Challenges

- 💡 Formal codes and standards systems lacking.
- 💡 Operational product certification processes not in place. A large amount of investment is needed to start certification.
- 💡 Enforcement non-existent.

# Scorecard

	US	CN	MX	CO	CR	DR	ES	GT	HN	NI	PN	PE
<b>Installation Code</b>	X	X	X	X	X	?	X	NO	IP	NO	X	NO
<b>Product Standards</b>	X	X	X	X	X	?	X	NO	IP	X	X	X
<b>Product Certification</b>	X	X	X	X	X	?	NO	NO	NO	NO	NO	NO
<b>Inspection</b>	X	X	X		X	?	NO	NO	NO	NO	NO	NO

IP: In process

# NEMA Activities in the Region

- 💡 In collaboration with the U.S. Department of Commerce, Outreach to the Region 2008-2010:
  - Meetings with relevant constituents
  - Seminars on standardization, testing and certification, anti-counterfeit, energy efficiency, environmental stewardship
  - Reverse trade missions in 2009 (NFPA) and 2010 (NECA)

# Putting Harmonized Standards to Work

- 💡 Gain/maintain market access
- 💡 Grow the market
- 💡 Facilitate moving from primary market to secondary
- 💡 Protect market share
- 💡 The infrastructure in the Americas is basically North American, providing a high degree of confidence:
  - Effective standards are manifested by the available and installed products, not by specific documents.



# Putting Harmonized Standards to Work

- 💡 Validates the use of the current product mix, to ensure a safe, reliable system
- 💡 Assures continued market access
- 💡 As the market/economy grows, leads to additional sales

# Harmonization Challenge

- 💡 **Selecting the base standard for the development of a harmonized standard:**
  - No particular type of standard is inherently higher or lower in its performance requirements.
  - CANENA procedures require an objective assessment prior to initiating work.
  - Including relevant IEC standards in the harmonization scope is increasingly important.
  - Lowering performance requirements is never in the suppliers nor buyers interests.

## A specific Challenge:

Strategically it is increasingly important for all product groups to actively address relevant IEC standards.

By 2011,

- all THCs complete a gap analysis between harmonized standards and relevant IEC standards.

By 2013,

- 25% of existing harmonized standards adopted in identified countries,
- All identified countries engaged in at least three CANENA THC standards programs
- 75% of all CANENA THC work programs based on IEC standards or contributing technically to IEC standards within their scope through IEC national committees.