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Upcoming Market Outlooks

Industrial Info Resources is pleased to present our upcoming market outlook schedule focusing on our core industries. Click below to learn more about upcoming events where Industrial Info will be hosting.
New Industrial Info PECWeb Enhancement Improves Access to Disaster Impact Tracker

Industrial Info recently introduced new Disaster Impact Tracker widgets. The Disaster Impact Tracker tool provides users with key insights into the impact of current natural disasters around the world. In just the first week of September, the tracker tool monitored a tropical storm that hit the U.S. Gulf Coast, a hurricane that threatened the U.S. East Coast and an earthquake that hit Japan. For more information, see September 6, 2018, article - Gulf Coast Weathers Tropical Storm Gordon, an Industrial Info Market Brief and September 7, 2018, articles - Tropical Storm Florence Forecast to Strengthen to Hurricane This Weekend, an Industrial Info Market Brief; Industrial Info Tracks Impact of Japan Earthquake, an Industrial Info Market Brief.

Merriam-Webster defines a widget as a small software application that is designed to provide a specific piece of information (such as news, weather or traffic updates) on demand.

The widgets help users simplify access to plant-related information during weather-related and earthquake events. Using Industrial Info's new PECWeb Dashboard Beta, clients can pin the widgets directly to their dashboards.

“We converted the PECWeb Dashboard to a new version that allows us to do new things. We are trying to widgetize the services we offer on the updated Dashboard,” said Christopher Keister, vice president of electronic products for Industrial Info.

Users of the Current Natural Disasters widget can immediately visualize and assess areas of impact and identify those plants and units potentially requiring disaster relief equipment and services.


Quick links allow users to view additional detail directly within the Disaster Impact Tracker Tool.

Users can view the total plant population that is offline or narrow down by type, add additional layers as well as filter offline events in a spreadsheet-like format. Third-party layers include data from the Global Disaster Alert and Coordination System (GDACS), the National Hurricane Center, and the National Data Buoy Center.

Industrial Info has been rolling out one to two new widgets per month, Keister said, adding, “We are hoping to accelerate that rate.” Clients can have up to 40 widgets on the updated dashboard, he said.

The widgets are not meant to replace applications that Industrial Info already makes available, but provide summaries of the information available. As an analogy, “Some people want the needle in the haystack [application]; other people want the whole haystack [widget],” Keister said.

To listen to this and other outlooks, visit Industrial Info's online Market Outlook Library.

Please enter any questions or suggestions below.

Questions/Suggestions:

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Make it Mean Something - Introducing Tableau Dashboards Using IIR's Market Intelligence

Telling the Hidden Story in our Data

Data is the building block for analytics, and Industrial Info Resources (IIR) has access to more data than ever before. As our coverage continues across the world, IIR's data scientists work together with our research experts to develop techniques that bring the most valuable insights with the help of visual analytics. There’s no doubt we are experiencing a very dynamic, daily changing environment, and it’s become more important and prevalent that business leaders have qualified answers to make strategic decisions. Data presentations are evolving rapidly, and to meet this challenge, we have begun to deploy products using common business intelligence software such as Tableau.

This year, IIR has incorporated the use of Tableau into our network environment so that we can create presentation dashboards for our clients that allow them to control and identify points of interest and dive deeper to find actionable insights and data using IIR’s market intelligence.

Customization is Key

Manipulating data in a way that will produce output that can be easily understood and digested by everyone can be difficult. It can also be very time-consuming to develop and launch an application that adequately meets all your requirements, especially if the data is dynamically changing or updated periodically.

IIR's Tableau-based products allow the user to have a new level of interactive custom analytics. IIR's interface allows you to visualize the data and analytics, and gives you the capability of adjusting the parameters to produce a multitude of different scenarios to visualize as well as merge your own internal data.

IIR provides off-the-shelf and custom-built dashboards in Tableau that grant users access to the analyzed data and allow them to be in control of what is being shown, compared or calculated.

User Case Studies

The IIR Tableau product line is client-driven and has very creative features that have been implemented in many products.

As an example, a client requested that their office locations also be layered on a map within custom market analysis that allowed for easy identification of potential opportunities nearby.

Another client requested the ability to explore wage fluctuations under various labor demand scenarios over time. Industrial Info developed a "What If?" dashboard that gave the user the option to visualize data under different circumstances.

Our Data, Your Inputs

Industrial info Resources keeps an open line of communication and utilizes client feedback to improve the user experience for all tools. The goal of implementing Tableau dashboards is to give users the ability to explore situations specific to your unique industry, region or case scenario.

Contact Info

For more information on how Industrial Info's analytics team can create a Tableau dashboard for your specific needs, contact our member services department at 800-762-3361.

customerservice@industrialinfo.com

www.industrialinfo.com

Please enter any questions or suggestions below.

Questions/Suggestions:
Industrial Info's North American Project Spending Index Rises 7.46% in August

Industrial Info's North American Industrial Project Spending Index was up 7.4% in August compared with the same month a year earlier, with eight of the 12 tracked industries showing increases. However, the numbers show a marked slowdown in year-over-year growth compared with the previous months of this year, when the growth rate ranged from 20.2% to 24.9%.

The North American Spending Index for August totaled $319.5 billion, up by $82.8 billion from August 2017.

Industrial Manufacturing registered the largest gain last month, with an increase of $13 billion, or 15.4%, over the amount of project activity in August 2017. Total manufacturing index activity amounted to $97.4 billion in August this year. One of the larger manufacturing projects now under construction is Tesla Incorporated’s (NASDAQ:TSLA) (Palo Alto, California) $5 billion lithium-ion battery "gigafactory" in McCarran, Nevada. Upon its completion in early 2020, the 5.8 million-square-foot facility will produce battery cells, modules and packs to supply Tesla's auto assembly plant in Fremont, California. For more information on the battery plant, see Industrial Info's project report.

Some of the other industries that had strong year-over-year gains in August include Oil, Gas and Refined Products Pipelines ($44.3 billion, up 28.8%), Oil & Gas Production (up $1.9 billion, up 17.7%) and Metals & Minerals ($30.9 billion, up 34.9%).

However, the Chemical Processing spending index totaled $18.8 billion, down 19.31% from August 2017, while Alternative Fuels totaled $2.8 billion, down 75.3%.

By market region, the U.S. Midwest saw the biggest year-over-year increase of $4.2 billion (96.6%).

Meanwhile, the North American Construction Starts Index for August totaled $191.6 billion, up 17.9% from a year earlier. Eight of the 12 industries tracked by Industrial Info saw year-over-year increases in investments. The Industrial Manufacturing Industry led the way with $63.4 billion last month, up 36.7% from August 2017. Construction kicked off last month on First Solar Incorporated's (Tempe, Arizona) (NASDAQ:FSLR) $400 million, thin-film solar module manufacturing plant in Walbridge, Ohio. When completed in late 2019, the plant will be able to produce enough panels to generate 1.2 gigawatts per year. For more information, see Industrial Info’s project report.

Some of the other industries that saw strong investment gains in the Construction Starts Index included Oil & Gas Pipelines ($19.8 billion, up 25.4%), Petroleum Refining ($3.3 billion, up 28.3%) and Metals & Minerals ($14.6 billion, up 50.6%). However, the Electric Power, Oil & Gas Production, Alternative Fuels and Chemical Processing Industries saw year-over-year reductions in project start investments.

Industrial Info’s North American Project Spending Gap Index (canceled, moved to another year, etc.) for August shows a trend of four consecutive months of greater fallout than a year earlier.

Project failouts totaled $335.4 billion in August, compared with $233.9 billion a year earlier. The Power Industry registered an additional $19.4 billion in failouts.

Please enter any questions or suggestions below.

Questions/Suggestions:
Industrial Info Tracks Bounty of Projects in Booming Permian Region

Researched by Industrial Info Resources (Sugar Land, Texas) – The Permian Basin region is expected to account for more than half the growth of U.S. crude oil production through 2019, according to the U.S. Energy Information Administration (EIA).

As such, Industrial Info is tracking nearly $16.5 billion in kickoffs for projects in the booming West Texas region that have a medium or high likelihood of moving forward as planned during the next 12 months. This includes big investments in crude oil pipelines and crude storage facilities in the 47 West Texas counties that are included in the region.

U.S. crude oil production will average a record 10.7 million barrels per day (BBL/d) in 2016 and 11.7 million BBL/d in 2019, according to the EIA’s August Short-Term Energy Outlook. The forecast for both 2018 and 2019 would surpass the previous record of 9.6 million BBL/d set in 1970.

The Permian region is expected to account for more than half of the growth in crude oil production through 2019, according to the EIA. Production in the region is forecasted to average 3.3 million BBL/d in 2018 and 3.9 million BBL/d in 2019. However, depressed wellhead prices in the region due to pipeline capacity constraints are contributing to slower crude oil production growth in the region in 2019 when compared with 2018.

Crude oil pipeline projects that are expected to kick off construction in the next 12 months account for nearly $3.8 billion in the West Texas region. This includes the 700-mile Gray Oak pipeline, a joint venture project of Phillips 66 Partners (NYSE:PSXP) and Andeavor (NYSE:ANDV) (San Antonio, Texas). The 800,000-BBL/d pipeline (expandable to 1 million BBL/d) will move crude oil from West Texas to destinations in the Corpus Christi and Sweeny/Freewater markets in Texas, according to Phillips 66. Origination stations will be constructed in Reeves, Loving, Winkler and Crane counties in West Texas, as well as from locations in the Eagle Ford production area in South Texas. The pipeline is expected to be placed in service by the end of 2019. For more information, see Industrial Info’s project report and July 30, 2018, article - Phillips 66 Posts High Quarterly Earnings With Many Projects on the Way.

Industrial Info is tracking more than $1.1 billion in crude oil storage projects that are expected to kick off during the next 12 months in the region. Among them is Crestwood Equity Partners LP’s (NYSE:CEQP) (Houston, Texas) planned crude oil and condensate terminal near Orla, Texas, which includes two 40,000-barrel crude oil tanks and a 76,000-barrel condensate tank, along with truck-unloading racks. The terminal will support the planned 200,000-BBL/d Delta Access Pipeline, which will run 180 miles from the Permian Basin, providing access to Cushing, Oklahoma, and Houston and Corpus Christi, Texas. For more information on the terminal, see Industrial Info’s project report. For more on Crestwood Energy Partners, see August 1, 2018, article - Midstream Operator Crestwood Equity Reports Net Loss for Quarter, Industrial Info Tracks $1.66 Billion in Projects.

In Wink, Texas, Rangeland Energy (Sugar Land, Texas) is performing a market analysis for a planned crude oil and truck unloading terminal, with an initial 480,000 barrels of crude storage. For more information, see Industrial Info’s project report.

The Permian region also includes three counties in eastern New Mexico, where Industrial Info is tracking nearly $671 million in medium- and high-probability projects that are expected to kick off construction in the next 12 months. The vast bulk of that amount is tied to $473 million in gas processing project activity.

Please enter any questions or suggestions below.

Questions/Suggestions:

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U.S. Power Industry Looks to $1.76 Billion in Active Maintenance Projects for 2018

Researched by Industrial Info Resources (Sugar Land, Texas) — As the U.S. Power Industry undergoes radical changes to its generation mix, such as the displacement of coal by natural gas and the fast-lining of nuclear growth, maintenance projects increasingly are needed to keep existing facilities economically efficient. Industrial Info is tracking more than $1.76 billion in active maintenance-related projects at U.S. power facilities that have started or are scheduled to kick off in 2018, more than $1.3 billion of which can be found at either natural gas-fired or nuclear power facilities.

Nuclear power plants are among the most expensive power-generation facilities to build and maintain, while relatively inexpensive natural gas-fired plants have only continued to grow in popularity. The corresponding long-term decline in new plant construction within the nuclear sector has led many nuclear plant operators to up their investments in maintenance projects. Across the U.S. South, numerous operational nuclear plants are performing or preparing to kick off maintenance outages at nuclear units, including:

- Duke Energy Corporation's (NYSE:DUK) Charlotte, North Carolina, 1,129-megawatt (MW) Unit 2 at the McGuire Nuclear Power Station in Huntersville, North Carolina; see project report
- Duke's 704-MW Unit 2 at the H.B. Robinson Nuclear Power Station in Hartsville, South Carolina; see project report
- Duke's 1,125-MW Unit 1 at the Catawba Nuclear Power Station in York, South Carolina; see project report
- Duke's 1,086-MW Unit 1 at the Oconee Nuclear Power Station in Seneca, South Carolina; see project report
- SCANA Corporation's (NYSE:SCG) Cayce, South Carolina, 995-MW Unit 1 at the Virgil C. Summer Nuclear Power Station in Jenkinsville, South Carolina; see project report
- Southern Company's (NYSE:SO) (Atlanta, Georgia), 1,150-MW Unit 1 at the Alvin W. Vogtle Nuclear Power Station in Waynesboro, Georgia; see project report
- Tennessee Valley Authority's (NYSE:TVA) (Knoxville, Tennessee) 1,182-MW Unit 2 at the Sequoyah Nuclear Power Station in Soddy Daisy, Tennessee; see project report
- Entergy Corporation's (NYSE:ETN) (New Orleans, Louisiana) 1,176-MW Unit 3 at the Watertford Three Nuclear Power Station in Hahnville, Louisiana; see project report

Click on the image at left for a graph detailing fuel types for U.S. Power Industry maintenance projects that have started or are scheduled to kick off this year.

One of the major advantages natural gas enjoys over nuclear is the lower cost of labor and maintenance, usually making up for the higher fuel cost associated with natural gas. Nuclear maintenance projects in 2018 account for the highest total investment value (TIV) for any fuel type at $869 million, but that TIV comes from only 32 projects. Natural gas-fired maintenance projects have a slightly lower TIV at $858 million, but from 239 separate projects. The highest-valued of these projects can be found at natural gas-fired, combined-cycle (NGCC) facilities, such as:

- OGE Energy Corporation's (NYSE:OGE) ( Oklahoma City, Oklahoma) 1,308-MW units 1 to 4 at the Redbud Power Plant in Luther, Oklahoma; see project report
- Starwood Capital Group's (Greenwich, Connecticut) 786-MW Unit 1 at the Marcus Hook Energy Center in Marcus Hook, Pennsylvania; see project report
- Entergy's 644-MW outage at the Hot Spring Energy Center in Malvern, Arkansas; see project report
- Oaklee Power Corporation's (Tuscaloosa, Georgia) 921-MW outage at the Chattahoochee Energy Facility in Franklin, Georgia; see project report
- General Electric Company's (NYSE:GE) (Fairfield, Connecticut) 400-MW outage at the Island Empire Energy Center in Monitee, California; see project report
- LS Power Group's (New York, New York) 1,100-MW outage at the Oneida Energy Center in Brown Arrow, Oklahoma; see project report
- Arclight Capital Partners LLC's ( Boston, Massachusetts) 392-MW Unit 2 at the Covert Generating Station in Covert, Michigan; see project report
- NextEra Energy Incorporated's (NYSE:NVEE) ( Juno Beach, Florida) 1,277-MW Block 2 at the West County Energy Center in Loxahatchee, Florida; see project report.

Despite accelerating GDP growth, total U.S. energy consumption decreased 0.2% in 2017, according to a report earlier this year from Bloomberg New Energy Finance. As the consumption of coal, natural gas and nuclear has declined, the U.S. has seen an expansion in the consumption of petroleum, hydro and renewable energy.

Though natural gas-fired generation remains the No. 1 producer of U.S. power at 32% of the generation market, according to Bloomberg it has decreased 8.1% from a decade ago. Meanwhile, renewable sources doubled their contribution to the generation mix to 19%. Hydropower facilities demand more maintenance than most other renewable-powered facilities, and account for almost all of the active renewable-based maintenance projects in 2018. These include:

- Xcel Energy Incorporated's (NASDAQ:XEL) ( Minneapolis, Minnesota) 100-MW Unit 1 at the Cabin Creek Pumped Storage Hydro Station in Georgetown, Colorado; see project report
- U.S. Bureau of Reclamation's 713-MW units 1 to 8 at the Shasta Lake Hydro Power Station in Shasta Lake, California; see project report
- Exelon Corporation's (NYSE:EXC) (Chicago, Illinois) 200-MW units 3 and 4 at the Muddy Run Hydro Power Station in Drumore, Pennsylvania; see project report
- Avista Corporation's (NYSE:AVA) (Spokane, Washington) 269-MW units 1 to 4 at the Cabinet Gorge Hydro Power Station in Clark Fork, Idaho; see project report
- Exelon's 486-MW units 1 to 11 at the Conowingo Hydro Power Station in Darlington, Maryland; see project report

Please enter any questions or suggestions below.

Questions/Suggestions:
Florida Greenlights Two More Gas-Fired Power Projects

Written by John Egan for Industrial Info Resources (Sugar Land, Texas)—Unlike California, Arizona and some other states, Florida has continued its embrace gas-fired power generation. Earlier this year, the state’s utility regulators approved construction of two new gas-fired plants, totaling more than 1,600 megawatts (MW), that will be built either by Seminole Electric Cooperative (Tampa, Florida) or for its benefit.

The two plants approved May 8 by the Florida Public Service Commission (FPSC) (Tallahassee, Florida) are:

- Seminole Generating Station, a 1,650-MW, combined-cycle plant expansion slated to be built in Putnam County, Florida. The Industrial Company, a unit of Kiewit Corporation (Omaha, Nebraska) is providing engineering, procurement and construction (EPC) services to this $945 million project. The project is in the engineering stage. Seminole said it expects to begin construction in late 2019. The plant is expected to begin operating in late 2022. For more information, see Industrial Info’s project report.
- A 575-MW unit expansion of the Shady Hills Generating Station, located in Pasco County, also was approved by Florida regulators in early May. The owner of that plant is a unit of General Electric Company (NYSE:GE) (Boston, Massachusetts). At an existing peaking power station, a combined-cycle unit will be added for about $250 million. Construction is expected to kick off in mid-2019 and to be completed by year-end 2021. Seminole will buy all the planned unit’s electrical output. For more information, see Industrial Info’s project report.

Because the two new generators will be built on existing power-generation sites, Seminole’s customers are expected to save an estimated $353 million, the FPSC said in a May 8 statement.

These two plants add to a growing list of gas-fired power plants in the Sunshine State that have been recently completed, are under construction or are planned to be built.

Completed in Last Two Years
- Florida Power & Light Company (FPL) (Juno Beach, Florida), a unit of NextEra Energy Incorporated (NYSE:NEE) (Juno Beach, Florida), invested about $1 billion to build a 1,205-MW peaking unit to the Lauderdale Combined-Cycle Power Station.
- Tampa Electric Company (Tampa, Florida), a unit of Emera Incorporated (TSE:EMA) (Halifax, Nova Scotia), invested about $700 million to add about 500 MW of new gas-fired generation capacity at the Polk County Generating Station.

Under Construction
- FPL is constructing the grassroots, 1,600-MW Okeechobee Clean Energy Center in Okeechobee County. Construction began in early 2017 and is expected to finish next summer. A unit of Zachry (San Antonio, Texas) is providing EPC services to this $1.2 billion project.
- The City of Tallahassee’s municipal utility is repowering its Arwide Hopkins Power Station by replacing retired combustion turbines and steam turbine generators with four gas-fired reciprocating engine generators totaling 74 MW. This $44 million project is scheduled to be complete in early 2019.

Planned
In addition to the two Seminole Electric Projects mentioned above, these Florida gas-fired power projects are scheduled to begin construction over the next two years:

- FPL is scheduled to invest about $888 million to modernize its Lauderdale Combined-Cycle Power Station, which will add about 1,200 MW of new gas-fired generation to the utility’s portfolio. That project is scheduled to begin construction next month and to be operating by mid-2022. For more information, see Industrial Info’s project report.
- Gulf Power Company (Pensacola, Florida), a unit of Southern Company (NYSE:SO) (Atlanta, Georgia), is adding 243 MW of new combustion turbine-generating capacity at its Scholz Generating Station in Sneads, Florida. For more information on the $240 million project, see Industrial Info’s project report.
- Gulf Power also plans to add 243 MW of combustion turbine-generating capacity to its Lansing Smith Power Station in Lynn Haven, Florida, at a cost of about $243 million. For more information, see Industrial Info’s project report.

Further into the future, Seminole Electric Cooperative plans to add about 486 MW of gas-fired generation to its existing Gilchrist County Generating Station site, in Gilchrist County, Florida. That $460 million project has been delayed several times in recent years, and current plans show construction beginning in late 2022. For more information, see Industrial Info’s project report.

Please enter any questions or suggestions below.

Questions/Suggestions:

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Upcoming Market Outlooks

Industrial Info Resources is pleased to present our upcoming market outlook schedule focusing on our core industries. Don’t miss these live and online opportunities to obtain insight into global market trends for the coming year and access valuable information from IIR’s industry experts.

- **Middle East & Africa (MEA) Oil & Gas Outlook**
  - **Webinar**
  - Tuesday, 23rd October
  - **Time:** 00:00 AM (CDT), 10:00 AM (EDT), 2:00 PM (GMT)
  - RSVP Now →

- **2019 Industrial Market Spending Outlook - Baton Rouge, LA**
  - **Conference**
  - Thursday, 1st November
  - **Time:** 08:00 AM (CDT), 10:00 AM (EDT), 2:00 PM (GMT)
  - RSVP Now →

- **APAC Chemical Processing Spending Outlook**
  - **Webinar**
  - Thursday, 7th November
  - **Time:** 08:00 AM (CDT), 10:00 AM (EDT), 2:00 PM (GMT)
  - RSVP Now →

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