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GLOBAL  
ENTERPRISE**

# TRENDS FOR US ENERGY SECTOR



**SWISS BUSINESS HUB USA**

# TRENDS FOR US ENERGY SECTOR



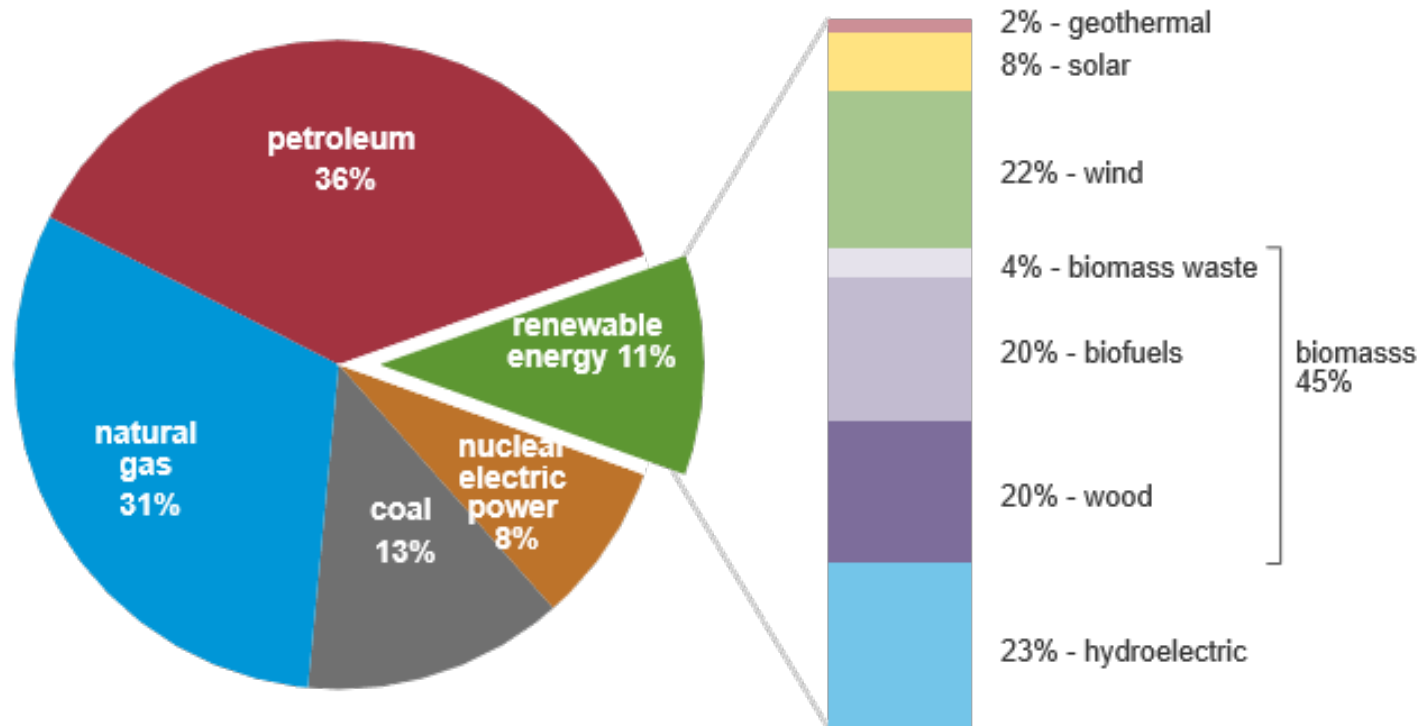
Source: IBIS World

## U.S. Energy Sector - Overview

### U.S. primary energy consumption by energy source, 2018

total = 101.3 quadrillion  
British thermal units (Btu)

total = 11.5 quadrillion Btu



Note: Sum of components may not equal 100% because of independent rounding.

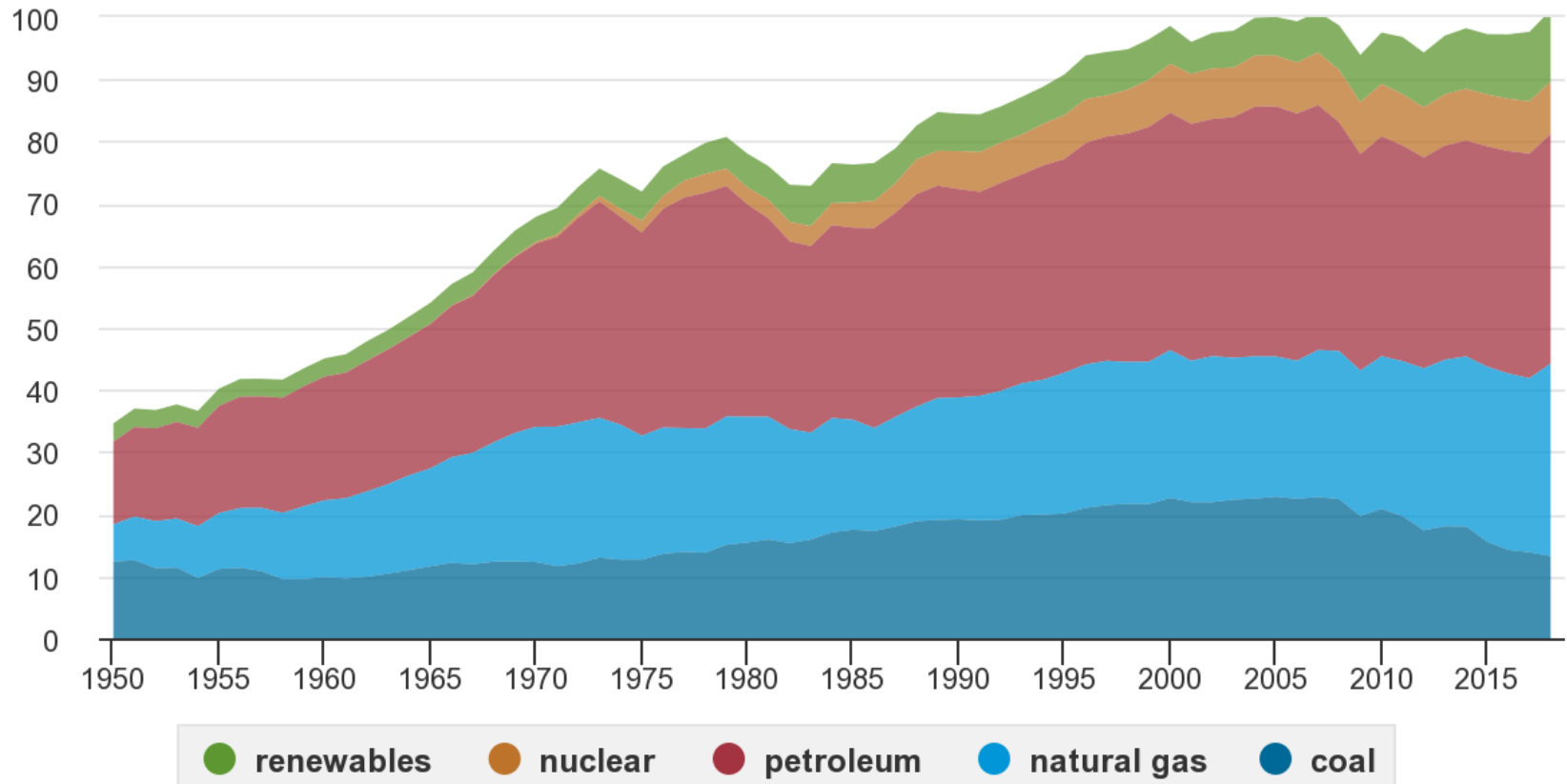
Source: U.S. Energy Information Administration, *Monthly Energy Review*, Table 1.3 and 10.1, April 2019, preliminary data



## U.S. Energy Sector - Overview

### U.S. primary energy consumption by major sources, 1950-2018

quadrillion British thermal units



Note: Petroleum is petroleum products excluding biofuels, which are included in renewables.  
Source: U.S. Energy Information Administration, *Monthly Energy Review*, Table 1.3, April 2019

## **U.S. Energy Sector – 3 Dominant Trends**

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### **1. Displacement of coal-fired generation**

- From 1,755,904 (2009) to 1,146,393 (2018) Thousand MWh (EIA)
- Decrease of -34,7%

### **2. Steady growth in natural gas**

- From 21,112,053 (2010) to 32,735,074 (2018) Million Cubic Feet (EIA)
- Increase of 55%
- Largest source of electrical generation in the U.S. since July 2015 (33%)

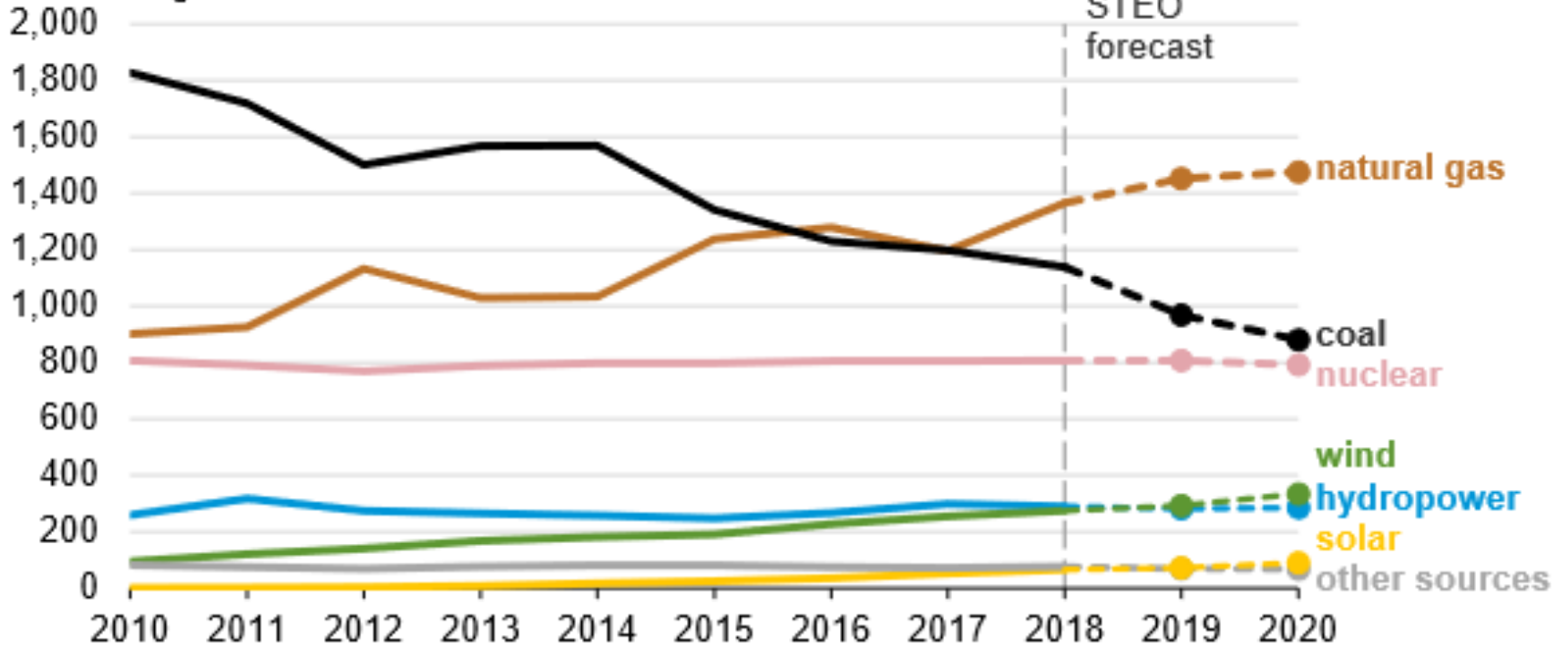
### **3. Rapid growth in wind and solar generation**

- Wind: 94,625 (2010) to 274,951 (2018) Thousand MWh (EIA) -> Increase of 190%
- Solar: 1,212 (2010) to 66,604 (2018) Thousand MWh (EIA) -> Increase of 7300%
- Half of all new U.S. electric capacity additions in 2018, representing \$29 billion in new investment
- Powered nearly 9% of all U.S. electricity consumption in 2018 (windsolaralliance.org)

## U.S. Energy Sector – 3 Dominant Trends

U.S. annual electric power sector generation (2010-2020)

million megawatthours



Source: EIA, 2019

## U.S. Energy Sector - Renewables

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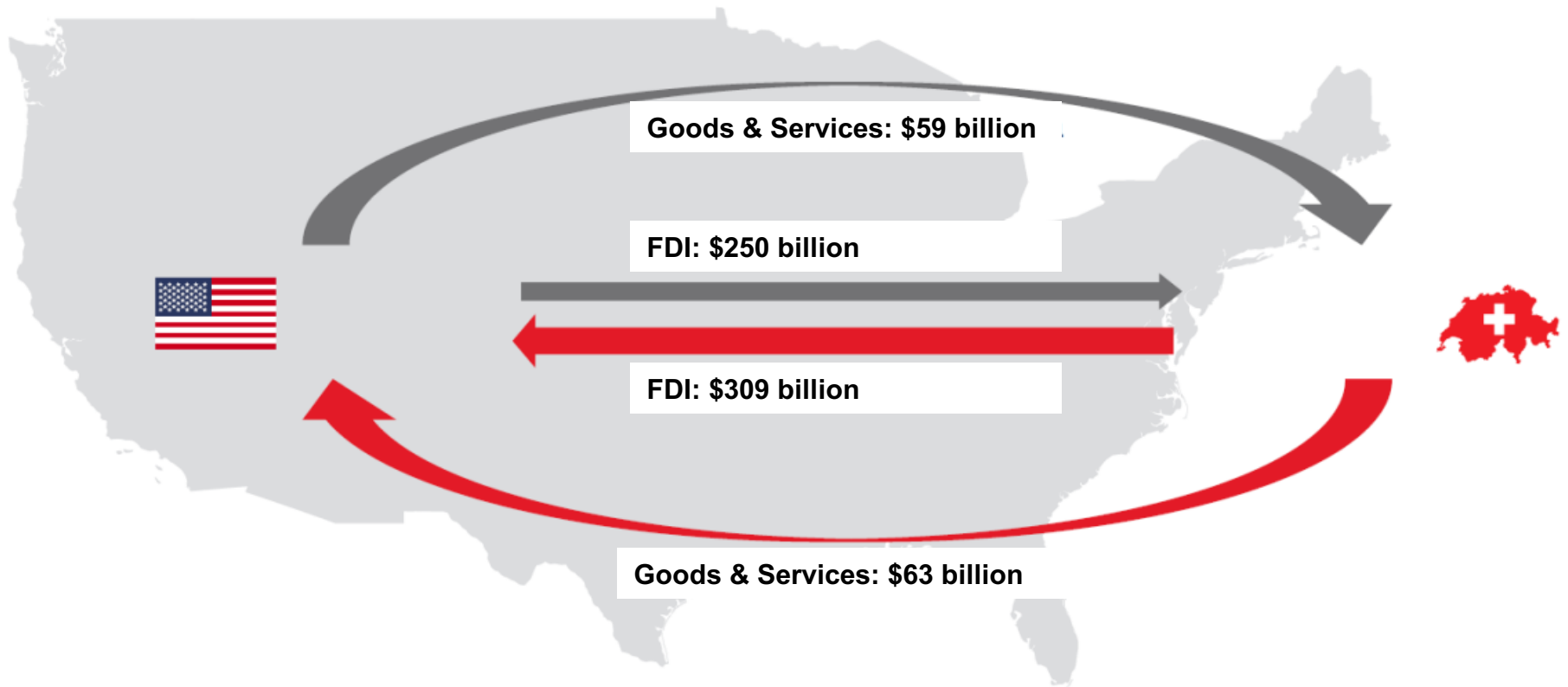
- One of the largest market for renewables in the world:
  - Largest geothermal capacity (3.7 GW)
  - Third-largest bioenergy capacity (14.2 GW)
  - Second-largest wind capacity (97.2 GW)
  - Second-largest hydropower capacity (102.1 GW)
  - Second-largest solar capacity (67 GW)
- Department of Energy: renewable energy has the potential to generate 80 percent of U.S. electricity by 2050, up from almost 20 percent today
- Second most attractive country for renewable energy investment (EY, 2019)

# US-SWISS RELATIONSHIP KEY FACTS & FIGURES



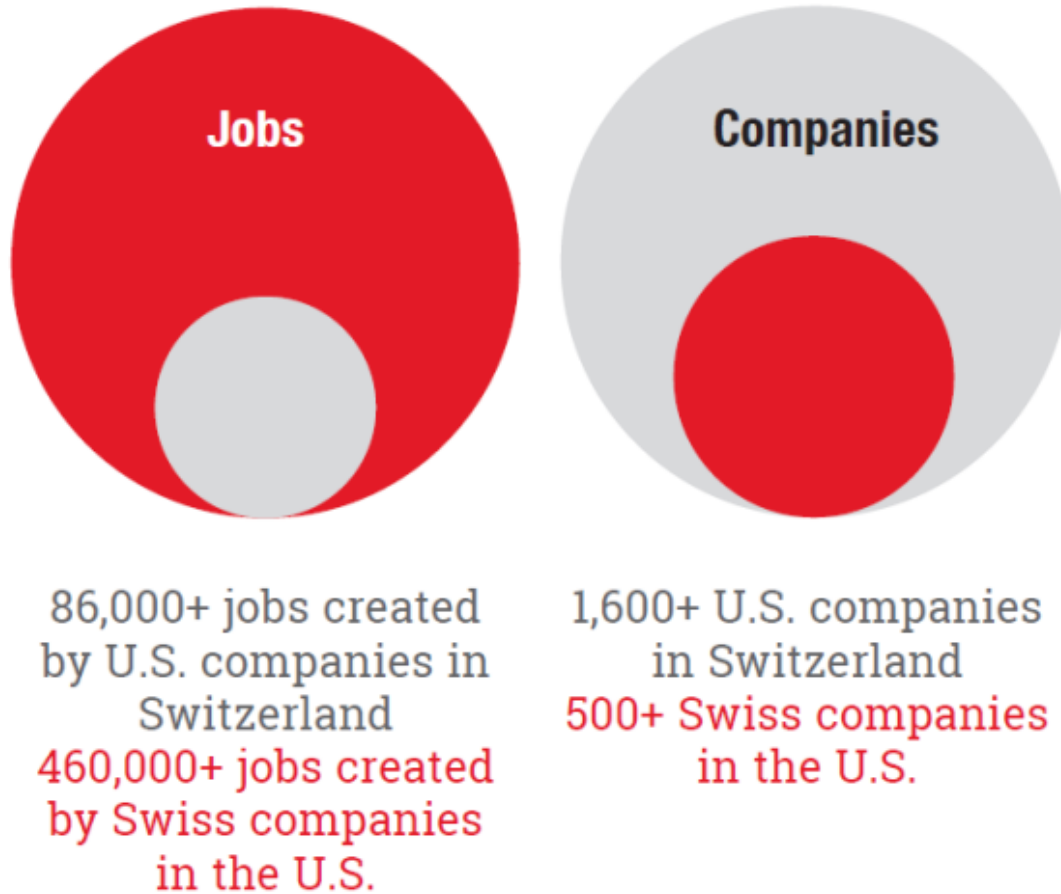


## Key Facts & Figures



Source: Swiss Economic Footprint 2017

## Key Facts & Figures



Source: Swiss Economic Footprint 2017

## **Some Key Rankings**

- USA is Switzerland's 2nd most important trading partner globally
- Switzerland is America's largest European trading partner outside of the EU (15th globally)
- Large and fast-growing foreign direct investments in both directions – doubling in the last 10 years
- Switzerland is the 7th largest foreign investor in the US Direct Swiss investment → USD 334 billion cumulativ investment
- Affiliates of Swiss companies support 500,000 American jobs (6th)
- Ranks 1st in terms of average salary (USD 103'200)
- Approx. 200'000 manufacturing jobs

# INTRODUCTION SWISS BUSINESS HUB



# TEAM USA



**Caroline Blaser**  
Head of SBH USA  
TC Export & Invest  
CG NYC



**Karine Wittmer**  
TC Export & Invest  
CG SF



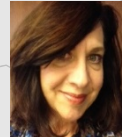
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Head of Investment  
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CG Los Angeles /SF

● San Francisco, CA

● Los Angeles, CA



**Kimberly Shulman**  
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● Atlanta, GA



**Sean Powers**  
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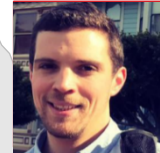
● Boston, MA  
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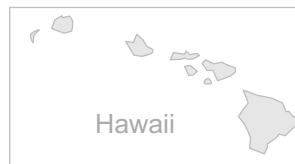
**Daniel Bangser**  
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## Core Mandates

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- Support Swiss SME's & start-ups looking to enter the US market
- Promote Switzerland as a business location

# Swiss Business Hub Services

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Search for distributors,  
local representatives  
and partners



Market information and  
detailed product  
analysis



Identification of  
potential investors



Organization of events  
and fact finding missions



Site location  
evaluation



B2B / B2C sales  
pipeline development



# U.S. Market Entry

The working steps  
of a Mandate





## Swiss Business Hub USA – FAQs

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- Should I incorporate or not?
- If so, where?
- Distribution partner vs. Sales representatives
- Sales Tax issues – what creates Nexus? (Wayfair ruling)
- Qualified introductions
- Export related issues (Customs, shipping terms, tariffs)
- Partnerships amongst U.S.-based Swiss business community

## SWISS PEER TO PEER CONFERENCE, October 30th 2019

# Swiss Peer-to-Peer Conference 2019

October 30th 2019, 8:00AM to 10:00PM

The Mid-America Club, 200 E Randolph St Chicago IL  
United States

REGISTER NOW >

**Keynote Speaker: Martin Ritter, CEO, Stadler Rail US**

Visit our website to get more information and to register

**[swiss-peer.com](https://swiss-peer.com)**

Partners: UBS and SABC



# THANK YOU



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