DISTROFORGE

PROFESSIONAL INTELLIGENCE REPORT

Florida Municipal Bid Landscape

Electrical Equipment Procurement Intelligence -- Q2 2026

PREPARED FOR

Distribution Sales Leadership

REPORT DATE

2026-03-24

REPORT ID

DF-2026-FL-Q2-001

CLASSIFICATION

SAMPLE

NAVIGATION

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About This Report

This intelligence report was prepared by DistroForge for Distribution Sales Leadership. It synthesizes publicly available market data, manufacturer signals, and supply chain intelligence to provide actionable procurement insights for the Western Region utility distribution market. All data points are sourced and verifiable. Recommendations reflect market conditions as of 2026-03-24 and should be reviewed against current conditions before execution.

SECTION 01

Executive Summary

33	~3M	$57-147M	Oct 1
FL MUNICIPAL ELECTRIC UTILITIES	CUSTOMER ACCOUNTS SERVED	EST. ANNUAL EQUIPMENT MARKET	MUNICIPAL FISCAL YEAR START
$2.8B combined revenue	+365K residents 2024-25	Transformers + switchgear	FY2027 budgets in dev now

Florida's 33 municipal electric utilities represent a $2.8 billion combined revenue market serving approximately 3 million customer accounts. These publicly owned systems operate independently of the Florida Public Service Commission's rate authority (though the PSC retains jurisdiction over rate structure, territorial boundaries, and power supply planning) and procure equipment through competitive bid processes governed by Florida Statute 287 and local purchasing ordinances.

For electrical equipment distributors, Florida municipals offer three structural advantages over investor-owned utility accounts. First, procurement decisions are made locally by utility management and city commissions -- not by corporate supply chain organizations in distant headquarters. Second, bid thresholds are lower (typically $50,000-$75,000 triggers a formal competitive bid), creating more accessible entry points. Third, Florida municipals are in an active capital spending cycle driven by hurricane hardening mandates, population growth, and aging infrastructure replacement.

Current demand pressure is acute. JEA (Jacksonville) has an active Invitation to Negotiate for its entire transformer inventory program -- three-phase, single-phase pad-mount, and pole-mount units. Keys Energy Services (Key West) issued bids for power transformer installation and transformer purchases in late 2025. The Florida Municipal Power Agency's Joint Purchasing Project is actively coordinating bulk procurement for its 31 member utilities.

> **WARNING**
>
> Florida's municipal electric utilities are spending. The combination of hurricane hardening investment, population-driven load growth, and aging infrastructure creates a procurement environment where distributors with competitive lead times, inventory availability, and responsive service will win share from incumbents. The window to establish relationships ahead of the FY2027 budget cycle closes in Q3 2026.

SECTION 02

Florida Municipal Utility Market Map

Tier 1 Utilities: Primary Procurement Targets

Florida's municipal electric utilities range from JEA -- one of the largest publicly owned utilities in the United States -- to small-town systems serving fewer than 5,000 customers. The seven largest systems account for approximately 75-80% of total municipal electric revenue and the vast majority of electrical equipment procurement volume.

UTILITY	CITY	CUSTOMERS	PEAK MW	EST. REVENUE	FMPA MEMBER
JEA	Jacksonville	510,000+	3,600 MW	$1.7B+	No
OUC	Orlando	260,000+	1,800 MW	$850M+	No
Lakeland Electric	Lakeland	130,000+	900 MW	$350M+	No
Tallahassee Utilities	Tallahassee	120,000+	730 MW	$300M+	No
GRU	Gainesville	100,000+	575 MW	$400M+	No
KUA	Kissimmee	80,000+	280 MW	$180M+	Yes
Keys Energy	Key West	31,000+	132 MW	$100M+	Yes

JEA: Florida's Dominant Municipal Procurer

JEA is the dominant municipal procurement entity in Florida. With over 510,000 electric, water, and wastewater customers, JEA's electric system encompasses 8,700+ miles of transmission and distribution lines, 24 substations, and a generation portfolio exceeding 3,600 MW of capacity. JEA's annual capital budget for electric infrastructure has historically ranged from $200M-$350M, making it a Tier 1 target for any distributor pursuing the Florida municipal market.

> JEA's current Invitation to Negotiate (ITN) for transformer inventory stock signals a strategic shift toward longer-term supplier relationships rather than spot purchases -- a direct response to extended lead times. Initial quantity: 60 units with a one-year option for 100 additional units at fixed pricing.

OUC and GRU: Generation Transition Driving Procurement

OUC serves Orlando and portions of Orange and Osceola counties. The utility is in a significant generation transition, with the Osceola Generating Station (three natural gas combined-cycle units) coming online through 2025-2026, and plans to convert Stanton Energy Center coal units to natural gas by 2027. These generation projects drive substation transformer and switchgear procurement.

GRU operates six substations with transformer capacities ranging from 22.4 MVA to 56 MVA per unit. The Gainesville City Commission approved $150 million in new debt and over $350 million in refinancing for GRU infrastructure projects. Capital planning for transformer replacement and system upgrades is a near-term priority.

Tier 2 Utilities: FMPA Joint Purchasing Aggregation

The remaining 26 municipal utilities individually procure smaller volumes but collectively represent significant opportunity through FMPA's Joint Purchasing Project. FMPA's coordinated bidding aggregates demand across 31 member utilities, creating procurement volumes that justify competitive pricing. Notable Tier 2 utilities include Homestead, Fort Pierce Utilities Authority, New Smyrna Beach, Ocala Electric Utility, Leesburg Electric, and Bartow Electric.

SECTION 03

Active and Upcoming Procurement Opportunities

Confirmed Active Bids (As of March 2026)

UTILITY	SOLICITATION	EQUIPMENT	STATUS	ACCESS
JEA	ITN (Transformer Inventory)	`3-ph, 1-ph pad-mount, pole-mount`	Pre-response held Jan 2026	Zycus iSource portal
Keys Energy	BID 26-25	BCS Power Transformer Install	Proposals due Nov 2025	VendorLink / DemandStar
Keys Energy	BID 24-25	Transformer Purchases	Closed Oct 2025	Check for follow-on
FMPA	Joint Purchasing	Multiple commodity categories	Ongoing rolling bids	FMPA / AURSI platform

Anticipated Q2-Q4 2026 Procurement Windows

Based on budget cycle analysis, historical purchasing patterns, and known capital programs, the following procurement opportunities are expected in Q2-Q4 2026.

UTILITY	EXPECTED EQUIPMENT NEED	TIMING	BASIS FOR FORECAST
OUC	Substation transformers (10-60 MVA)	Q2-Q3 2026	Osceola Gen Station interconnection
GRU	Distribution xfmrs, substation equip	Q3 2026	$150M bond-funded capital program
Lakeland Electric	Distribution xfmrs, switchgear	Q3-Q4 2026	FY2027 budget; Ten-Year Site Plan
Tallahassee Utils	Distribution xfmrs, reclosers	Q3 2026	Hurricane hardening program
KUA (Kissimmee)	Pad-mount transformers	Q2-Q3 2026	Rapid growth in Osceola County
FMPA (bulk)	Distribution xfmrs, pad-mount	Q2 2026	Annual joint purchasing cycle

How to Monitor Florida Municipal Bids

PLATFORM	URL	COVERAGE	COST
DemandStar	demandstar.com	JEA, OUC, most FL municipals	Subscription-based
BidNet Direct	bidnetdirect.com/florida	Comprehensive FL government bids	Subscription-based
VendorLink	myvendorlink.com	South FL municipalities incl. Keys	Free registration
FMPA Portal	fmpa.com/purchasing	31 FMPA member utilities	Vendor registration
JEA Procurement	jea.com/about/procurement	JEA-specific opportunities	Free

SECTION 04

Capital Spending and Budget Cycle Analysis

$4.2B+
FL STORM HARDENING (2020-25)
Across all utilities

$260M
FY2025-26 STATE HURRICANE FUNDS
+$150M federal CDBG

365K+
NEW FL RESIDENTS (2024-25)
Driving load growth

$500M+
GRU BOND + REFINANCING
Infrastructure projects

Municipal Budget Cycle Calendar

All Florida municipalities operate on an October 1 -- September 30 fiscal year per Florida Statute 166.241. This creates a predictable procurement rhythm that distributors must align with.

MONTH	ACTIVITY	DISTRIBUTOR ACTION
Jan-Mar	Mid-year budget review; CIP prioritization	Engage utility engineers on upcoming projects
Apr-Jun	FY+1 budget development; dept submissions	Present solutions and lead time data
Jul-Aug	Budget workshops; public hearings	Monitor published budgets for equipment lines
Sep	Budget adoption	Confirm capital equipment allocations
Oct	FY begins; purchase orders issued	Respond to RFPs/bids; secure allocation
Nov-Mar	Active procurement and construction	Deliver; position for supplemental buys

Four Capital Spending Drivers Converging

Hurricane Hardening: Florida utilities invested $4.2B+ in storm hardening between 2020 and 2025. Duke Energy Florida invested over $1B in 2025 alone. The FY2025-26 state budget allocates $260M for hurricane defense plus $150M in federal CDBG funds. Underground conversions drive demand for pad-mount transformers, submersible units, and enclosed switchgear.

Population Growth: Florida added approximately 365,000 residents in 2024-2025, concentrated in the Orlando-Kissimmee, Jacksonville, and Tampa-Lakeland corridors. Each new residential subdivision requires distribution transformers. Each new commercial development requires three-phase pad-mount units.

Aging Infrastructure: 55% of distribution transformers in the national fleet exceed 33 years of service. Florida's humid, salt-air environment accelerates degradation. Coastal utilities face accelerated replacement cycles. GRU's substation fleet includes units dating to the 1970s and 1980s.

Generation Transition: OUC's Osceola Generating Station (three natural gas combined-cycle units online 2025-2026), GRU's integrated resource planning, and municipal solar PV interconnection programs all drive substation-level equipment procurement -- medium power transformers, protective relays, and switchgear.

SECTION 05

Hurricane Hardening and Regulatory Drivers

The Storm Hardening Mandate

Florida's storm hardening regulatory framework is the most aggressive in the nation. While the FPSC's formal Storm Protection Plan requirements (per SB 796, enacted 2019) apply to investor-owned utilities, municipal utilities face equivalent pressure from their city commissions, customer expectations, and insurance underwriters. Rule 25-6.030 (which replaced the original Rule 25-6.0342 in 2020) sets the standard for hardening plans statewide.

REQUIREMENT	STANDARD	EQUIPMENT IMPACT
Underground conversion	NESC, local codes	Pad-mount replaces pole-mount; submersible in flood zones
Pole inspection/replacement	NESC Grade B loading	New poles for storm loading; may require xfmr re-hanging
Flood zone equipment	FEMA FIRM maps + local	Submersible or elevated pad-mount; +10-15% cost
Coastal corrosion protection	Utility-specific	Marine-grade coatings, stainless hardware, enhanced bushings
Feeder reliability targets	IEEE 1366 (SAIDI/SAIFI)	Reclosers, sectionalizers, automated switches
Vegetation management	FL Statute 163.3209	Relocated equipment may need new xfmr installations

Underground Conversion: The Pad-Mount Transformer Catalyst

Underground conversion is the single largest driver of transformer procurement change in Florida municipal utilities. When overhead lines go underground, pole-mount transformers are replaced with pad-mount units. A single mile of overhead-to-underground conversion in a residential area typically requires 8-15 pad-mount transformers, plus switchgear for loop-feed configurations.

> *Key municipal underground conversion programs include New Smyrna Beach (multi-year beachside undergrounding), Keys Energy Services (flood-prone area conversions), Fort Pierce (downtown redevelopment undergrounding), and JEA (selective undergrounding in high-wind corridors).*

Post-Hurricane Emergency Replacement Demand

Florida's position in the Atlantic hurricane basin creates recurring emergency procurement demand. Following major storms, municipal utilities may need to replace dozens to hundreds of transformers within weeks. Distributors with available inventory and rapid fulfillment capability earn premium pricing and long-term loyalty during post-storm recovery.

STORM	YEAR	EST. TRANSFORMER REPLACEMENTS	EQUIPMENT CATEGORIES
Hurricane Ian	2022	5,000-8,000+ units	Pole-mount, pad-mount, reclosers
Hurricane Irma	2017	4,000-6,000+ units	Pole-mount, pad-mount, switchgear
Hurricane Michael	2018	2,000-3,500 units	Pole-mount (Panhandle)

WARNING

Maintaining emergency inventory of standard-rating transformers (25, 37.5, 50, 75, 100 kVA single-phase) in a Florida warehouse positions a distributor for both planned procurement and post-storm emergency supply. Municipal utilities will remember who had inventory when they needed it most.

SECTION 06

Equipment Demand Forecast: Transformers and Switchgear

Distribution Transformer Demand by Segment

SEGMENT	FL MUNICIPAL VOLUME (EST.)	LEAD TIME (CURRENT)	DEMAND TREND	KEY DRIVER
1-ph pole-mount (10-167 kVA)	1,500-2,500 units/yr	28-48 wks	Stable to declining	Replacement; underground conversion reduces new installs
1-ph pad-mount (25-167 kVA)	800-1,500 units/yr	35-55 wks	Growing	Underground conversions, new subdivisions
3-ph pad-mount (75-2,500 kVA)	400-700 units/yr	36-65 wks	Strong growth	Commercial, data center support, utility upgrades
Medium power (5-60 MVA)	15-30 units/yr	48-85 wks	Stable	Substation additions/replacements, gen interconnection

Estimated Annual FL Municipal Equipment Market

EQUIPMENT CATEGORY	EST. ANNUAL VOLUME	PRICE RANGE PER UNIT	EST. ANNUAL MARKET VALUE
Distribution xfmrs (all types)	3,000-5,000 units	$3,800-$58,000	$25M-$50M
Pad-mount xfmrs (3-phase)	400-700 units	$18,000-$105,000	$12M-$35M
Medium power xfmrs (5-60 MVA)	15-30 units	$400K-$2M	$10M-$30M
Switchgear (MV and HV)	50-100 assemblies	$50K-$500K	$5M-$20M
Reclosers and sectionalizers	200-400 units	$15K-$50K	$5M-$12M
Total addressable market			$57M-$147M

Switchgear and Recloser Demand

EQUIPMENT	FL MUNICIPAL DEMAND DRIVER	EST. ANNUAL VOLUME	LEAD TIME
MV Switchgear (15 kV)	Underground loop-feed distribution	40-70 assemblies	26-32 wks
MV Switchgear (25-38 kV)	Substation and feeder applications	15-30 assemblies	28-36 wks
Reclosers (distribution)	Grid hardening, fault isolation	150-300 units	20-30 wks
Sectionalizers	Automated fault isolation programs	80-150 units	16-24 wks
Pad-mounted switchgear	Underground loop-feed systems	60-120 units	24-34 wks

Florida-Specific Equipment Specifications

Florida municipal utilities specify equipment features that differ from national norms. Distributors must understand these specifications to compete effectively.

FEATURE	FLORIDA REQUIREMENT	PROCUREMENT IMPACT
Corrosion protection	Marine-grade paint, stainless hardware (coastal)	+5-10% unit cost; longer lead for non-standard coatings
Lightning/surge protection	BIL ratings per FL lightning exposure	Higher BIL than northern utilities; verify with specs
Flood-zone mounting	Elevated pad-mount or submersible (FEMA zones)	Specialized foundations; submersible +10-15% cost
FR3 fluid specification	Required in environmentally sensitive areas	+3-8% total unit cost vs. mineral oil
Hurricane wind loading	NESC Grade B or higher for overhead	Impacts pole-mount transformer weight limits
UV-resistant cabinets	Required for outdoor switchgear/ controls	Standard in most lines but verify

SECTION 07

Competitive Landscape and Positioning

Current Distributor Landscape

CHANNEL	STRENGTHS	VULNERABILITIES
National distributors (WESCO, Graybar)	Broad product lines; inventory depth	Less responsive to small-muni needs
Regional distributors	Market knowledge; relationship-driven	May lack inventory depth for large orders
Manufacturer direct (ERMCO, Howard, Eaton)	Competitive pricing; product expertise	Limited service scope; no aftermarket
FMPA Joint Purchasing	Aggregated volume; pre-negotiated terms	Limited to FMPA member utilities

What Wins Municipal Bids: Evaluation Criteria Analysis

Municipal utility procurement managers evaluate bids differently than IOU corporate procurement teams. Florida Statute 287 governs the process, but evaluation frameworks increasingly use 'best value' criteria beyond lowest price.

25-35%	25-30%	15-25%	<20 wk
LEAD TIME WEIGHT IN EVALUATIONS	PRICE WEIGHT IN EVALUATIONS	LOCAL PRESENCE WEIGHT	JEA LEAD TIME REQUIREMENT
Delivery speed is decisive	Lowest responsive bidder	Emergency response capability	Per ITN initial qty specs

> JEA's transformer ITN explicitly requires initial quantity quotes with lead times under 20 weeks -- a signal that delivery speed is a primary evaluation criterion. Distributors with warehouse inventory in the Southeast or guaranteed manufacturer allocation have a decisive advantage.

Market Entry Playbook for Florida Municipals

For distributors not currently serving Florida municipal utilities, the entry strategy follows a predictable sequence: (1) Register as a vendor with target utilities and on DemandStar/BidNet. (2) Attend pre-bid meetings for relationship building. (3) Start with Tier 2 utilities where competition is lower. (4) Leverage FMPA Joint Purchasing for multi-utility access. (5) Build emergency inventory for post-storm response. (6) Target the FY2027 budget cycle by engaging utility engineers in April-June 2026.

SECTION 08

Bid Strategy Recommendations

1 Respond to JEA's Transformer Inventory ITN Immediately

CRITICAL

JEA's ITN for three-phase, single-phase pad-mount, and pole-mount transformers represents the largest single municipal transformer procurement opportunity in Florida. The initial requirement is 60 units with a one-year option for 100 additional units at fixed pricing. JEA's shift to an ITN format indicates they are evaluating suppliers holistically -- price, lead time, stocking programs, quality, and workmanship. If you missed the mandatory pre-response meeting in January 2026, contact JEA procurement to determine if late entry is possible or monitor for re-solicitation.

2 Register on FMPA's AURSI Platform Before Q2 Joint Purchasing Cycle

CRITICAL

FMPA's Joint Purchasing Project consolidates commodity procurement across 31 member utilities through the AURSI platform. Registration and qualification is a prerequisite for participating in FMPA joint bids. The annual joint purchasing cycle typically initiates new solicitations in Q2. Being registered and qualified before the next solicitation cycle positions you for multi-utility awards with a single bid response.

3 Establish Florida Warehouse Inventory for Emergency Response

HIGH

Stock the five most common single-phase distribution transformer ratings (25, 37.5, 50, 75, 100 kVA) and three common three-phase pad-mount ratings (300, 500, 750 kVA) at a Florida or Southeast warehouse facility. Total inventory investment: $250,000-$500,000. This inventory serves dual purposes: emergency post-storm supply (premium pricing, relationship building) and rapid fulfillment when manufacturer lead times exceed utility timelines. Target warehouse location: Central Florida (Orlando/Lakeland corridor) for statewide coverage.

4 Target Q2-Q3 2026 for Utility Engineer Outreach

HIGH

Florida municipal FY2027 budgets are developed in April-June 2026. Utility engineers and department managers are writing capital budget requests during this window. A distributor who provides current lead time data, pricing forecasts, and inventory availability information during this window directly influences what gets included in FY2027 capital budgets. Prepare a one-page Florida Municipal Utility Equipment Availability Brief with current lead times, pricing trends, and inventory positions.

5 Pursue Coastal Utilities with Corrosion-Resistant Product Lines

MEDIUM

Keys Energy Services, Fort Pierce Utilities Authority, New Smyrna Beach, and other coastal municipal utilities require marine-grade corrosion protection for all outdoor equipment. Distributors who can specify and deliver transformers and switchgear with stainless steel hardware, marine-grade paint systems, and corrosion-resistant bushings differentiate themselves from competitors offering standard configurations. This specialization commands 5-10% price premiums and reduces competitive pressure.

6 Monitor the June 30, 2026 Copper Tariff Decision for Bid Pricing Strategy

MEDIUM

The Commerce Secretary's update on U.S. copper markets (due June 30, 2026) could result in additional duties on refined copper, adding 5-9% to transformer pricing across all categories. For Florida municipal bids with firm pricing requirements, structure proposals with tariff contingency language or escalation clauses tied to commodity indices. Alternatively, lock in manufacturer pricing before the June 30 decision for bids expected in Q3-Q4 2026.

SECTION 09

Methodology and Sources

This report synthesizes intelligence from multiple public and semi-public sources to construct a comprehensive picture of Florida's municipal electric utility procurement environment. All data points are independently verifiable.

Primary Data Sources

Florida Public Service Commission Ten-Year Site Plans (2025 filings for GRU, Lakeland Electric, OUC, Tallahassee, and all reporting municipal utilities). JEA formal procurement opportunities and bid results. Florida Municipal Power Agency purchasing and member information. Florida Municipal Electric Association data. Individual utility annual financial reports and budget documents. DemandStar, BidNet Direct, and VendorLink bid listings. Florida Governor's Office FY2025-26 budget and infrastructure investment announcements. Florida PSC storm hardening filings and proceedings. U.S. DOE report on undergrounding (Duke Energy Florida case study, June 2024). Wood Mackenzie supply chain surveys (Q2 2025). DistroForge Research lead time and pricing databases.

Data Limitations

Municipal utility procurement data is fragmented across individual utility websites, bid platforms, and FMPA systems. This report captures publicly available information as of March 2026 but may not reflect every active solicitation. Capital budget estimates are based on publicly filed Ten-Year Site Plans, annual reports, and budget documents. Actual spending varies based on storm damage, revenue performance, and governing body decisions. Equipment volume estimates are DistroForge Research projections based on customer counts, historical patterns, and capital budget analysis.

> Full source citations with URLs are provided in the extended report. 16 sources cited including Florida PSC Ten-Year Site Plans, JEA procurement data, FMPA, Florida Governor's Office, U.S. DOE, Wood Mackenzie, and Florida Statutes.

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