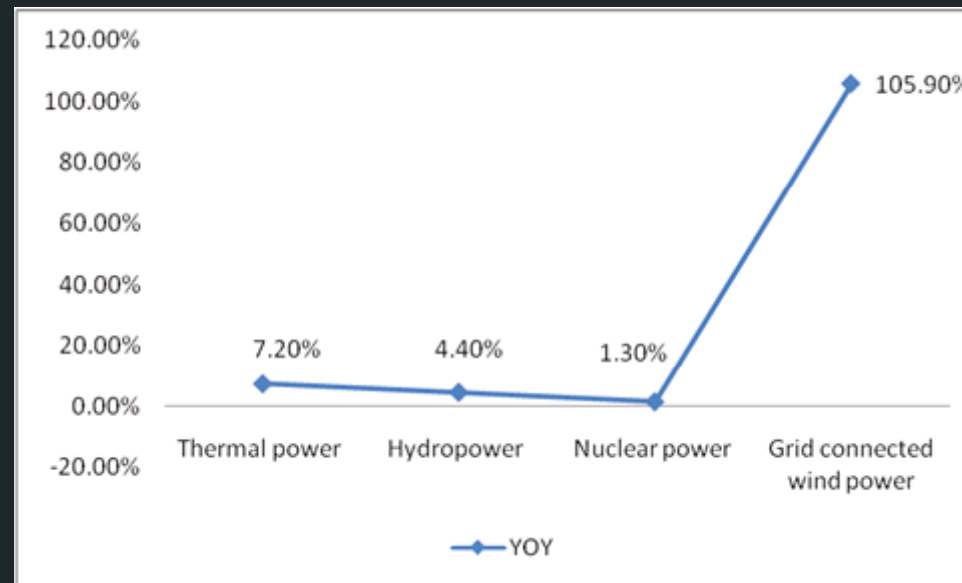


## China Electric Power Industry Report, 2009-2010



China's electric power industry made rapid progression in 2009 under the drive of investment and macro-policy. The investment into the electric power infrastructure topped RMB755.84 billion in 2009, up 19.93% yr-on-yr; and the accumulated generating capacity reached 3650.6 TWh, in particular the annual generating capacity of grid-connected wind power even rose 105.9% yr-on-yr fueled by renewable energy policy.

### YoY Growth Rates for Generation Capacity of Power Sources, 2009



Source: ResearchInChina

Bolstered by economic recovery, the power consumption in such industries as iron & steel and building materials has increased continuously especially since Jul, 2009. In comparison, non-ferrous metal contributed less to power consumption in 2009, just up 0.42% yr-on-yr, but it has strongly rebounded since the beginning of 2010 and recorded a 51.2% YoY rise in Jan.-Feb. In addition, the power consumption in western provinces and municipalities has grown slowly since Q4 2009, particularly the continuous drought in Southwest China has resulted in the successive decline in hydraulic power for nearly three months in 2010, down 6.6%, 12.9% and 26.9% respectively.

Apart from electric power generation, transmission and three major industries of China's power sector, and power consumption by industry and region, the report also analyzes the installed capacity, power generation & sales and

operation of the five large power generating companies in China, as well as introduces the projects under construction or to be constructed, and future development strategies.

As of the end of 2009, the installed capacity of GD Power Development Co., Ltd had achieved 16.2575 GW, of which thermal power was 12.804 GW, and hydropower 2.9855 GW, wind power 468,000 KW.

Meanwhile, the controllable installed capacity of Huaneng Power International Inc reached 48.55 GW at the end of 2009, up 18.6% yr-on-yr; and thermal power now accounts for around 90% of its total power installed capacity. It will actively push natural gas generating project and participate in the engineering of nuclear power projects in the future through its cooperation with petrochemical companies.

SDIC completed its material asset reorganizations in Nov, 2009, and then the ratio of attributable installed capacity of hydraulic power generating units to the total increased to 36% from 13%, so the power supply structure got much improved, effectively easing SDIC's cost-control pressure brought by current fluctuations in coal price. Being one of China's largest power companies, the operating revenue and profit of Huadian Power International Inc hit RMB36.662 billion and RMB1.643 billion respectively in 2009, which was mainly ascribed to the drop in coal price.

The power generation of Datang International Power Generation Co., Ltd accomplished 141.8685 TWh in 2009, up 11.98% yr-on-yr, which was fueled by the expanding capacity of generating units, rising 5,645MW from a year earlier, of which thermal power units increased 4,660MW, hydropower and wind power capacity respectively 735MW and 250MW.

# Table of Contents

- **1 Electric Power Supply in China, 2009**
  - 1.1 Generation
  - 1.2 Generating Structure
  - 1.3 Power Transmission
  
- **2 Electric Power Demand in China, 2009**
  - 2.1 Social Power Consumption
  - 2.2 Power Consumption by Industry
  - 2.3 Power Consumption by Region
  
- **3 Operation of Chinese Power Enterprises, 2009**
  - 3.1 Generating Companies
  - 3.2 Power Suppliers
  
- **4 Operation of China's Electric Power Industry, Jan.-Feb.2009**
  - 4.1 Power Supply
    - 4.1.1 Power Generation
    - 4.1.2 Power Transmission
  - 4.2 Power Consumption
    - 4.2.1 Overview
    - 4.2.2 Power Consumption in Three Main Industries
      - 4.2.3 Power Consumption by Industry
    - 4.2.4 Power Consumption by Province and Municipality
    - 4.2.5 Utilization Hours
  
- **5 China's Key Listed Power Companies**
  - 5.1 GD Power Development Co.,Ltd
    - 5.1.1 Company Profile
    - 5.1.2 Installed Capacity
    - 5.1.3 Power Generation
    - 5.1.4 Operation
    - 5.1.5 Projects under Construction or to be Constructed
  - 5.2 Huaneng Power International Inc.
    - 5.2.1 Company Profile

- 5.2.2 Installed Capacity
- 5.2.3 Installed Structure
- 5.2.4 Power Generation
- 5.2.5 Projects under Construction
- 5.3 State Development & Investment Corporation (SDIC)
- 5.3.1 Company Profile
- 5.3.2 Power Generation
- 5.3.3 Material Asset Reorganizations
- 5.4 Huadian Power International Corporation Limited
- 5.4.1 Company Profile
- 5.4.2 Operation
- 5.4.3 Power Generation
- 5.4.4 Installed Structure
- 5.5 Datang International Power Generation Co., Ltd
- 5.5.1 Company Profile
- 5.5.2 Operation
- 5.5.3 Power Generation
- 5.5.4 Strategies

## Selected Charts

- China's Monthly Power Generation, 2009
- China's 6,000KW-above Power Generation Structure, 2009
- Social Power Consumption and Growth by Quarter, 2009
- Power Consumption in China's Three Major Industries, 2009
- Provinces and Municipalities with Higher Growth Rate of Power Consumption than National Average, 2009
- Accumulated Operating Revenue and Total Profit of China's Power Generating Companies, 2009
- Accumulated Sales Revenue of China's Power Suppliers, 2009
- Accumulated Total Profit of China's Power Suppliers, 2009
- Power Generation by Power Source, Jan.-Feb.2010
- Y-o-Y Growth of Thermal Power Utilization Hours since 2005
- China's Trans-region Power Transmission, Jan.-Feb.2010
- Share of Power Consumption by Industry, 2009-2010
- Ratio of Monthly Power Consumption of Four Major Manufacturing Industries, 2009-2010
- Top Ten Provinces and Municipalities by Power Consumption, 2009-2010
- Utilization Hours of Thermal Power and Hydraulic Power Facilities, 2008-2010
- Hydraulic Power Utilization Hours in Five Southwest Provinces, Feb. 2010
- Provinces with Leading Hydropower Stations and the Thermal Power Utilization Hours in Neighboring Provinces
- Installed Capacity Structure of GD Power Development, 2009
- Quarterly On-Grid Power of GD Power Development, 2008-2009



- Operating Revenue and Profit of GD Power Development, 2007-2009
- Operation of Main GD Power Development Share-holding Companies, 2009
- Projects under Construction of GD Power Development, end of 2009
- Hebei-Inner Mongolia Coal-Power Integration Projects
- Operating Revenue and Net Profit of Huaneng Power International Inc, 2008-2009
- Generating Units Put into Production of Huaneng Power International Inc, 2009
- Generating Units Put into Production of Huaneng Power International Inc, 2010
- Installed Capacity Structure of Huaneng Power International Inc, 2008-2010
- Power Generation of Huaneng Power International Inc by Power Plant, 2008-2009
- Some Projects under Construction of Huaneng Power International Inc
- Non-listed Power Generation Projects of Huaneng Power International Inc
- Operating Revenue and Net Profit of SDIC, 2007-2009
- Assets Acquisition of SDIC, 2009
- SDIC Power Supply Structure (Attributable Capacity Ratio) before and after Acquisition
- SDIC Service Area Expansion (Attributable Capacity Ratio) before and after Acquisition
- Operating Revenue and Net Profit of Huadian Power International, 2008-2009
- Ratio of Coal Cost to Total Cost of Huadian Power International
- Installed Capacity of Huadian Power International, 2008-2011
- Power Supply Structure of Projects under Construction of Huadian Power International
- Operating Revenue and Net Profit of Datang International Power Generation, 2007-2009

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