

## China Smart Grid Equipment Segmented Market Report, 2009-2010



In 2009, State Grid Corporation of China put forward the construction of a strong smart grid, and determined the year of 2010 to be the key year for smart grid construction and smart equipment R&D. Different with other countries, China will carry out the smart grid construction covering all the links including power generation, transmission, distribution, utilization and scheduling so as to create opportunities for the rapid development of smart grid equipment such as the energy storage batteries for power generation, the digital substation and flexible transmission equipment for power transmission and distribution, the smart meters, electric vehicle charging cabinets, distribution automation devices for power utilization, as well as the smart schedulers for power scheduling.

Starting with China's smart grid construction plan and project, the report has shed light on the development of a number of market segments including smart meter, energy storage battery, digital substation, flexible transmission and smart scheduling, provided a deep insight into key companies by field, as well as a look into the future market.

China's application of smart meters is still in the initial stage, and automatic meter reading (AMR) system is given priority and widely used to replace mechanical meters. Promoted by the prosperity of smart meters such as carrier wave electronic meter and the construction of China's smart grid, traditional meter companies have successively entered into the smart meter field. Shenzhen Clou Electronics Co., Ltd and Wasion Group Limited won the first phase bidding for smart meters in China (East & Central China) in 2009, and Clou Electronics delivered an extraordinary performance by ranking top three in terms of the number of bidding it won.

#### Top Three Bid Winners in the First Bidding for Smart Meters in East & Central China, 2009

Rank	2S Single-phase Smart Meter	Number (Unit)	1S Three-phase Smart Meter	Number (Unit)	0.5S Three-phase Smart Meter	Number (Unit)
1	Ningbo Sanxing	877,379	Sunrise Technology	146,664	Wasion Group	35,214
2	Shenzhen Clou	812,200	Shenzhen Clou	88,116	Ningbo Sanxing	8,600
3	Wasion Group	420,500	Hangzhou PAX	75,380	Shenzhen Clou	6,500

Source: ResearchInChina

In 2006, China built the first digital substation, an 110KV digital substation, in Cuifeng, Qujing, Yunnan. China's digital substation had ranked the leading position in the world by the year of 2009, with more than 70 substations put into operation. It is forecasted that China's digital substation market will reach RMB4-4.5 billion each year in the following ten years.

Static Var Compensator (SVC) has been widely applied in flexible power transmission in China, and the SVC market capacity in China's industry market was around RMB1.2 billion as of 2009. Rongxin Power Electronic Co., Ltd (RXPE), the leader in China's flexible transmission field, accounted for around 53% in China's SVC market. In addition, RXPE achieved sales revenue of RMB922 million, of which high-voltage dynamic reactive power compensation device SVC accounted for 52.15%.

State Grid established Caoxi Electric Vehicle Charging Station, China's first commercial electric vehicle charging station, in August 2009. Then China's biggest electric vehicle charging station officially opened in Shenzhen at the end of 2009. In 2010, State Grid and China Southern Power Grid Co., Ltd plan to establish over 100 charging stations, which will push the market development of equipments such as public transport/public charging stations.

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