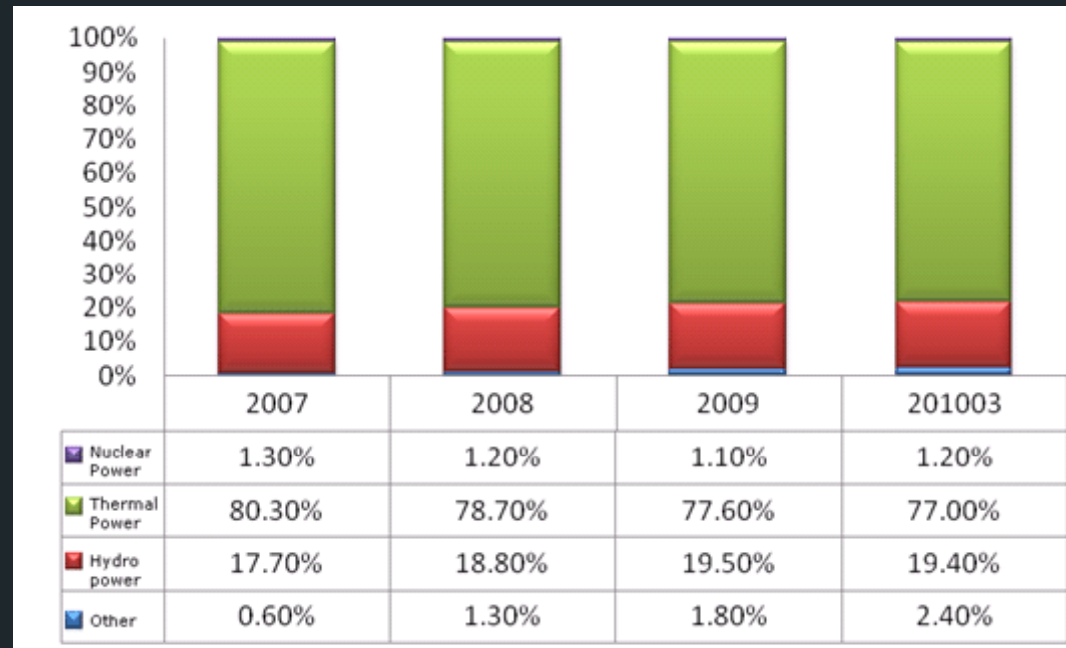


## China Clean Energy Industry Report, 2009-2010



Clean energy refers to the energy that doesn't discharge pollutants, mainly including nuclear energy, hydropower, wind power, solar power, bio-energy (biogas), and tidal energy. At present, China's energy consumption structure is still dominated by thermal power, and the structure won't change in the near future. But in the long run, clean energy will account for an increasingly larger proportion in electricity generating capacity. The figure below shows that the proportion of nuclear power, hydropower and other power sources increased from 19.7% in 2007 to 23.0% in March 2010, up 3.3 percentage points. As China launches more preferential policies for nuclear power, wind power and solar energy industry, the proportion of clean energy power generation will increase substantially.

### China's Power Generation Capacity by Industry, 2006-2010



Source: China Electricity Council

In 2010, hydropower and nuclear power are major contributors to China's clean energy power generation, while wind power and solar energy account for a smaller proportion. Promoted by the gradual integration of wind power into the electric power grid as well as the preferential policies for solar energy industry, the installed capacity and power generation capacity of China's wind power and solar energy industry will be further enhanced.

Nuclear energy: in 2009, there were 11 nuclear power generating units operated in China, 10 nuclear power projects and 28 generating units were approved, of which 20 units or 21.92 GW are under construction now. According to China's nuclear power projects under construction and planned to be built, it's expected that China Will add the installed nuclear power capacity of about 30 GW by 2015 and own total installed nuclear power capacity of about 87.93 GW by 2020.

Wind energy: in 2009, China added 10,129 wind power generating sets, with capacity of 13803.2MW, up 124% yr-on-yr; 21,544 wind power generating sets in total, with capacity of 25805.3MW, up 114% yr-on-yr. In 2009, China's wind power equipment industry had built up a production system for key parts such as blade, gearbox, generator and pylon, which had progressively eased the tension between the supply and demand of such key parts as blade, generator, gearbox and wheel hub, but still failed to bridge the supply-demand gap for bearing and control system.

Solar energy: in 2009, China add installed photovoltaic solar energy capacity was 140MW, accounting for about 2% of global installed capacity. Promoted by the Solar Roofs program and the Golden Sun program, China's solar energy installation market will grow substantially in 2010. It's expected that China's solar energy market will add installed capacity of 450MW in 2010, which will further change the status quo of insufficient domestic demand.

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