



**China Smart Grid PLC Industry Report,
2010-2011**

May 2011

This report

- ◆ **Analyzes the profile and industry chain of smart grid PLC industry.**
- ◆ **Focuses on the development trends, opportunities and challenges of smart grid PLC industry.**
- ◆ **Highlights the operation of PLC chip and smart meter manufacturers.**

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Abstract

PLC (Power Line Communication) refers to the transmitting of data or information by the existing power lines. With the current technologies, PLC finds application primarily in the power management market, and the main products cover PLC meter, collector and concentrator.

State Grid Corporation of China plans a projection of about RMB 80 billion for the construction of the power information collection system in its 27 provincial branches during 2011-2015; wherein, the capital of approximately RMB27 billion is used to purchase smart meters, and it will install 500 million smart meters in the upcoming five years. In 2010, PLC meter takes a share of less than 8% in electric meter stock in China. In the future, China's PLC meter will by degrees replace the ordinary meter. By 2015, the share of PLC meter will exceed 50%. Besides, the sales volume of PLC chips will present a CAGR of 52% in China from 2011 to 2015.

Foreign manufacturers boast advanced PLC chip technologies, but system solutions do not perform well in the application of smart grids in China. Chinese manufacturers have the advantage in localization. As of April, 2011, the main Chinese PLC chip vendors include: Eastsoft, FXXC, Miartech, Qingdao Topscomm Communication, Risecomm, and Leaguer MicroElectronics, of which Eastsoft and FXXC lead the market competition.

State Grid Corporation of China have invited the biddings for energy meter for four times in 2010, accomplishing purchase volume of 38.4727million smart meters, which accounted for 80% of the total. There are nearly 100 manufacturers of smart meter in China, and the industry features fierce competition. The quantity of smart meters won by the top four bidding manufacturers get the proportion of 31.2% of the total tendered.

The number of smart meter biddings obtained by Ningbo Sanxing Electric accounts for 10%, and 7.3% for Wasion Group, the two of which rank the first echelon. Other three including Henan XJ Instrument Corporation, Chint Instrument and Meter Company, and Jiangsu Linyang Electronics Co., Ltd., obtained stable numbers in the four times of tendering. And they rank the second echelon.

Top Ten Bidding Manufacturers for Smart Meter Procurement by State Grid Corporation of China, 2010

<i>Rank</i>	<i>Manufacturer</i>	<i>Smart Meters Obtained in the Tenders</i>
1	Ningbo Sanxing Electric	3871330
2	Wasion Group	2818244
3	Ningxia LGG Instrument Co., Ltd	1906700
4	Haoningda	1758774
	Holley Metering	1665623
6	Henan XJ Instrument Corporation	1608339
7	Chint Instrument and Meter Company	1532272
8	Jiangsu Linyang Electronics Co., Ltd.	1387072
9	Shenzhen Techrise Electronics Co., Ltd	1088206
10	Beijing Banner Electric	1021728

Source: State Grid Corporation of China; ResearchInChina

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