



China High-Voltage Switch Industry Report, 2010-2011

Oct. 2011

This report

- ◆ **Analyzes the development of China high voltage switch industry.**
- ◆ **Focuses on high voltage switch products and competition in the industry .**
- ◆ **Highlights the operation of high voltage switch manufacturers.**

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Abstract

With China's accelerating construction of power grid in recent years, the high-voltage switch industry has realized buoyant development, especially in the field of 126KV-above high-voltage switch apparatuses, where the number of manufacturers has swelled from 5 to more than 40.

Among 126KV-above high-voltage switch apparatuses, 500KV, 750KV and 1,000KV have been the highlights in recent years. As of H1 2011, China had made breakthrough in key technologies such as 500KV single-break SF6 breaker equipment, super-power operation mechanism and 1,000KV disconnecting switch based on the technologies of 500KV and 750KV. Meanwhile, the switchgear equipment for three transformer substations of China's first AC 1,000KV test demonstration project (Southeast Shanxi-Nanyang-Jingmen UHV line) developed by three switch heavyweights (China XD, New Northeast Electric (Shenyang) High Voltage Switchgear Co., Ltd., and Henan Pinggao Electric Co., Ltd.) have run smoothly for two years.

The report analyzes the development, demand & supply, technology of the high-voltage switch industry in China in recent years, and focuses on the following three market segments: circuit breaker (CB), gas insulated switchgear (GIS), disconnecting switch & earthing switch (DS&ES)

1. CB

With the popularity of oil-free switchgears in recent years, high-voltage CB products such as SF6 CB and vacuum circuit breaker (VCB) have won acclaims in the market. In particular, SF6 CB equipment is classified as the leading high-voltage and EHV and UHV product system in China, while VCB concentrates on the voltage of 40.5KV or below.

2. GIS

Alongside with increasingly mature GIS technology in China in the past decade, several GIS production bases have emerged in Xi'an, Shenyang and Pingdingshan, with representative enterprises including China XD, Henan Pinggao Electric Co., Ltd., and New Northeast Electric (Shenyang) High Voltage Switchgear Co., Ltd. In addition, international businesses like ABB, Siemens and Areva have thrust into the Chinese GIS market by merit of advanced technologies.

3. DS&ES

DS&ES is a kind of power transmission and transformation equipment that used more common, generally 2-3 times of high-voltage CB, in power supply system. Driven by the construction of UHV AC/DC power grid in recent years, DS&ES have been leapfrogging towards high voltage, EHV and even UHV, with representative enterprises including Hunan Changgao High Voltage Switchgear Group Co., Ltd., China XD, Henan Pinggao Electric Co., Ltd., and New Northeast Electric (Shenyang) High Voltage Switchgear Co., Ltd.

Additionally, the report also highlights 15 key enterprises including three foreign-owned ones such as ABB, Siemens and Areva as well as 12 domestic businesses like China XD, Henan Pinggao Electric Co., Ltd., and Hunan Changgao High Voltage Switchgear Group Co., Ltd.

China XD is a power transmission and transformation equipment flagship with the most powerful system integration strength in China, mainly engaged in the production of high-voltage switch, transformer, lightning rod, insulator, etc. It provided 1,000KVH-GIS, reactor, capacitive voltage transformer (CVT), lightning rod, ES and insulator for China's megavolt-level demonstration project (Southeast Shanxi-Nanyang-Jingmen UHV line) and realized smooth on-grid operation.

Moreover, it offered transformer, converter valve, capacitor and arrester for Yunnan-Guangzhou ± 800 KV UHV DC power transmission project.

Henan Pinggao Electric Co., Ltd. is the flagship enterprise in China's UHV switch industry with solid R&D capabilities. In March 2011, it independently developed the world's first 800KV intelligent CB and successfully put it into operation; in August 2011, its EHV and UHV DC DS technical project was tested to be qualified.

Hunan Changgao High Voltage Switchgear Group Co., Ltd. is a leading business in high-voltage DS industry of China, with the major products including 126-1100kV outdoor high-voltage DS and ES. Since 2010, its revenue from 550KV or above, 363KV, 252KV DS, especially 550KV or above DS, has been declining, mainly due to two reasons: first, the investment demand has shrunk in the wake of the huge investment in 550KV-750KV backbone network in 2008-2009; second, the examination & approval and construction of 1,000KV or above UHV projects have slowed down since 2011.

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