



**China Smart Meter Industry Report,
2011-2012**

Oct. 2011

This report

- ◆ **Analyzes the development of China smart meter industry.**
- ◆ **Focuses on bidding market segments of SGCC.**
- ◆ **Highlights the operation of key smart meter manufacturers.**

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Abstract

Smart meter is one of the terminal equipment of power transmission and distribution network. Presently, the State Grid Corporation of China (SGCC) is involved in most of the investment in the power grid construction in China. The smart meter bidding of SGCC is an apparent indicator of the smart meter industry in China. In 2011, the market size of the first four smart meter biddings of SGCC hit 43.911738 million units. In particular, the market size of 2S single-phase smart meters, major products in the four biddings, hit 39.699619 million units, making up 90.41% of the total.

The report pictured the status quo and development trend of China's smart meter industry based on the smart meter bidding statistics of SGCC, and highlights the industrial competition pattern and key enterprises at large.

In terms of the competition pattern, a total of 65 enterprises won the bid for smart meter in the first four biddings of SGCC in 2011. The bidding results showed a low industrial concentration ratio (CR), with CR10 and CR5 reaching 46.37% and 28.18% respectively, indicating open competition in the industry.

In addition, there were only 4 enterprises with the bid winning share more than 5% respectively, and the four included: Jiangsu Linyang Electronics (601222.SH), Wasion Group Holdings Limited (03393.HK), Shenzhen Clou Electronics (002121.SZ) and Ningbo Sanxing Electric (601567.SH).

Occupancy of Top 10 Smart Meter Bid Winners in the First Four Biddings of SGCC, 2011

Ranking	Enterprise	Share
1	Jiangsu Linyang Electronics Co., Ltd.	6.48%
2	Wasion Group Holdings Limited	6.07%
3	Shenzhen Clou Electronics Co., Ltd.	5.95%
4	Ningbo Sanxing Electric Co., Ltd.	5.54%
5	Holley Metering Limited	4.14%
6	Ningxia LGG Instrument Co., Ltd.	3.89%
7	Hangzhou Hexing Electrical Co., Ltd.	3.85%
8	Shenzhen Haoningda Meters Co., Ltd.	3.70%
9	Shenzhen Kaifa Technology Co., Ltd.	3.63%
10	Shenzhen Techrise Electronics Co., Ltd.	3.12%

Source: ResearchInChina

Jiangsu Linyang Electronics (601222.SH) gets about 87% of its sales from the bidding market other than SGCC, mainly including the market formed by provincial and municipal grids of SGCC which invite bids independently, China Southern Power Grid market and overseas market. In the first four biddings of SGCC in 2011, Linyang Electronics became the largest smart meter bid winner with a share of 6.48% in the total bidding volume. In addition, its smart meter project under construction has an annual capacity of 5.5 million units, which will expand the annual smart meter capacity of Linyang Electronics to 8.5 million units when it's put into production in 2013.

Wasion Group Holdings Limited (03393.HK) became the runner-up with a share of 6.07% (2.663597 million units) in the total smart meter bidding volume of the first four biddings of SGCC. In addition, it occupied the overwhelming majority in terms of the bid winning volume of 0.2S three-phase smart meter, the highest-end product, with the accumulated number totaled 12,734 units, accounting for 99.17% of the total.

Ningbo Sanxing Electric (601567.SH) is mainly engaged in the production of smart electricity meter, ordinary electronic electricity meter, etc. In 2010, its output of smart electricity meter registered 3.324504 million units, with the sales volume of 2.38612 million units and sales value of RMB364.1942 million. In the first four biddings of SGCC in 2011, it won the bid for 2.433237 million smart meters, making up 5.54% of the total, ranking the fourth place. Presently, the company's 6.5 million units/year smart meter project is under construction, and the project is expected to start production in 2013.

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