



# China Smart Grid Equipment Segmented Market Report, 2010-2012

Mar. 2012

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind, and State Grid Corporation of China etc .

## Abstract

According to the plan of State Grid Corporation of China (SGCC), 2011-2015 will be dedicated to all-round promotion of smart grid construction. But in fact, 2011 only saw expansion of pilot implementation, and the actual investment was about RMB 30 billion, which was less than the RMB 51.8 billion scheduled. It's expected that 2012 will see the fastest growth in the smart grid investment during the "12th Five-Year Plan" period (2011-2015), and hence accelerated growth in related smart grid equipment market.

Among all the smart grid equipment market segments in China, smart meter has the largest market scale, which is expected to be about RMB 8.25 billion in 2012. In 2011, 65 enterprises won the smart meter bidding of SGCC, and in 2010 there were 76. According to the bidding volume won in 2011, the market share was dispersed, and there were only four enterprises each occupying more than 5%, indicating a rather low market concentration ratio.

The bidding volume of smart substation saw significantly accelerated growth in 2011. In the six power transmission and substation equipment biddings in 2011, the bidding volume of smart substation increased successively. Up to the sixth bidding, 162 of the 582 substations for centralized bidding were smart ones, accounting for 28%. 75 smart substations were built up in 2011, and more than 300 smart substations are expected to be built up in 2012.

In the field of smart scheduling, NARI Technology Development and China Electric Power Research Institute (EPRI) occupy the major market share in integrated regulation and control, smart grid scheduling technology support system and large-scale centralized control station. During the "12th Five-Year Plan" period, China's smart scheduling market capacity is expected to be about RMB 2 billion annually.

## The Report mainly covers the following contents:

- Development of smart grid and smart grid equipment in China;
- Current status and prospect of smart meter, energy storage battery, digital substation, flexible power transmission, electric vehicle charging equipment and smart scheduling markets;
- Development of smart meter market in China, bidding, risks and trends in smart meter market segments;
- Operation, bid winning and prospect of 14 smart grid equipment companies.

In addition, according to the smart grid construction progress and the scale of investment in various fields, the key direction of the next phase will be smart substation and smart meter, and the construction of smart substation will be the most important. During the "12th Five-Year Plan" period, the total investment of SGCC in smart grid will be RMB 286.11 billion, with annual investment of RMB 57.22 billion on average.

## Investment Plan of State Grid Corporation of China, 2011-2015

(RMB bn)

	2011	2012	2013	2014	2015	Total
<b>Power Generation</b>	1.67	1.67	0.17	0.37	0.16	4.05
<b>Power Transmission</b>	1.64	1.86	1.85	1.88	1.82	9.06
<b>Power Substation</b>	10.74	14.23	14.1	13.99	14.37	67.43
<b>Power Distribution</b>	5.82	5.88	9.29	4.08	4.61	29.69
<b>Power Consumption</b>	11.13	16.02	17.78	18.92	14.36	78.21
<b>Scheduling</b>	3.59	3.44	3.47	2.99	3.13	16.63
<b>Communication and Information</b>	17.24	18.7	16.65	14.91	13.54	81.05
<b>Total</b>	51.83	61.82	63.33	57.14	52	286.11

Source: State Grid Corporation of China; ResearchInChina

### Preface

#### 1. Development of Smart Grid Equipment in China

- 1.1 Smart Grid
- 1.2 China's Smart Grid Construction has Entered Comprehensive Construction Stage
- 1.3 Smart Grid Equipment Benefits from Smart Grid Construction

#### 2. China's Smart Meter Market

- 2.1 Smart Meter
- 2.2 Policy
- 2.3 Smart Meter Bidding Requirements of SGCC
- 2.4 Smart Meter Market
- 2.5 Smart Meter Market Segments
  - 2.5.1 2S Single-phase Smart Meter
  - 2.5.2 1S Three-phase Smart Meter
  - 2.5.3 0.5S Three-phase Smart Meter
  - 2.5.4 0.2S Three-phase Smart Meter
- 2.6 Risks and Trends
- 2.7 Key Companies
  - 2.7.1 Shenzhen Clou Electronics Co., Ltd.
  - 2.7.2 Wasion Group Holdings Limited
  - 2.7.3 Shenzhen Haoningda Meters Co., Ltd.
  - 2.7.4 Shenzhen Kaifa Technology Co., Ltd.

#### 3. China's Energy Storage Battery Market

- 3.1 Development of Energy Storage Battery in China
- 3.2 Prospect of Energy Storage Battery Market
- 3.3 Key Companies
  - 3.3.1 Narada Power Source Co., Ltd.
  - 3.3.2 EVE Energy Co., Ltd.

#### 4. China's Digital Substation Market

- 4.1 Development of Digital Substation in China
  - 4.1.1 Definition
  - 4.1.2 Development
- 4.2 Key Companies
  - 4.2.1 Guodian Nanjing Automation Co., Ltd.
  - 4.2.2 XJ Electric
  - 4.2.3 NARI-Relays Electric Co., Ltd.

#### 5. China's Flexible Power Transmission Market

- 5.1 Flexible Power Transmission
- 5.2 SVC Application in China
- 5.3 Prospect of Flexible Power Transmission Market
- 5.4 Key Companies
  - 5.4.1 RXPE
  - 5.4.2 Sieyuan Electric

#### 6. China's Electric Vehicle Charging Equipment Market

- 6.1 China's Electric Vehicle Charging Station Market
  - 6.1.1 Construction
  - 6.1.2 Prospect
- 6.2 Key Company – Shenzhen Auto Electric Power Plant Co., Ltd. (ATC)

#### 7. China's Smart Scheduling Market

- 7.1 Grid Scheduling
- 7.2 Grid Scheduling Automation in China
- 7.3 Prospect of China's Smart Scheduling Market
- 7.4 Key Companies
  - 7.4.1 NARI-TECH
  - 7.4.2 Dongfang Electronics (DFE)

#### 8. Summary

- China's Smart Grid Construction Plan
- China's Key Smart Grid Construction Projects, 2009-2011
- Smart Grid Investment Plan of SGCC, 2011-2015
- Primary Equipment and Secondary Equipment Investment of SGCC, 2012-2020E
- Ranking of Key Secondary Equipment by Market Size
- Single-phase Smart Meter and Three-phase Smart Meter
- Smart Meter Policies in China, 2003-2012
- New Bidding Rules of SGCC, 2011
- Bid Appraisal Scoring Structure of SGCC, 2011
- Main Purchasers of Smart Meter
- SGCC Smart Meter Bid Winning Results by Batch, 2010-2011
- SGCC Smart Meter Bid Winning Results by Product, 2010-2011
- SGCC Smart Meter Bid Winning Results by Winner, 2010-2011
- SGCC 2S Single-phase Smart Meter Bid Winning Results by Batch, 2010-2011
- SGCC 2S Single-phase Smart Meter Bid Winning Results by Winner, 2010-2011
- SGCC 1S Three-phase Smart Meter Bid Winning Results by Batch, 2010-2011
- SGCC 1S Three-phase Smart Meter Bid Winning Results by Winner, 2010-2011
- SGCC 0.5S Three-phase Smart Meter Bid Winning Results by Batch, 2010-2011
- SGCC 0.5S Three-phase Smart Meter Bid Winning Results by Winner, 2010-2011
- SGCC 0.2S Three-phase Smart Meter Bid Winning Results by Batch, 2010-2011
- SGCC 0.2S Three-phase Smart Meter Bid Winning Results by Winner, 2010-2011
- Industry Concentration of SGCC Smart Meter Bid Winning Enterprises, 2010-2011
- Capacity Expansion of Major A Share Listed Smart Meter Companies
- Main Products of Shenzhen Clou Electronics
- Operating Revenue and Total Profit of Shenzhen Clou Electronics, 2008-2011

- Operating Revenue of Shenzhen Clou Electronics by Industry, 2008-2011
- Operating Revenue of Electronic Instrument and Meter Business of Shenzhen Clou Electronics by Product, 2008-2011
- Gross Margin of Electronic Instrument and Meter Business of Shenzhen Clou Electronics by Product, 2008-2011
- SGCC Smart Meter Bidding Won by Shenzhen Clou Electronics, 2010-2011
- Volume of SGCC Smart Meter Bidding Won by Shenzhen Clou Electronics by Type of Smart Meter and Batch of Bidding, 2010-2011
- Share of SGCC Smart Meter Bidding Won by Shenzhen Clou Electronics by Type of Smart Meter and Batch of Bidding, 2010-2011
- Turnover and Gross Profit of Wasion Group, 2008-2011
- Turnover of Wasion Group by Product, 2008-2011
- SGCC Smart Meter Bidding Won by Wasion Group, 2010-2011
- Volume of SGCC Smart Meter Bidding Won by Wasion Group by Type of Smart Meter and Batch of Bidding, 2010-2011
- Share of SGCC Smart Meter Bidding Won by Wasion Group by Type of Smart Meter and Batch of Bidding, 2010-2011
- Operating Revenue and Total Profit of Shenzhen Haoningda Meters, 2008-2011
- Operating Revenue of Shenzhen Haoningda Meters by Product, 2009-2011
- Gross Margin of Shenzhen Haoningda Meters by Product, 2009-2011
- Operating Revenue of Shenzhen Haoningda Meters by Region, 2009-2011
- SGCC Smart Meter Bidding Won by Shenzhen Haoningda Meters, 2010-2011
- Volume of SGCC Smart Meter Bidding Won by Shenzhen Haoningda Meters by Type of Smart Meter and Batch of Bidding, 2010-2011
- Share of SGCC Smart Meter Bidding Won by Shenzhen Haoningda Meters by Type of Smart Meter and Batch of Bidding, 2010-2011
- Operating Revenue and Total Profit of Shenzhen Kaifa Technology, 2008-2011
- Operating Revenue of Shenzhen Kaifa Technology by Product, 2009-2011
- Operating Revenue of Electricity Meter of Shenzhen Kaifa Technology, 2009-2011
- SGCC Smart Meter Bidding Won by Shenzhen Kaifa Technology, 2010-2011

- Volume of SGCC Smart Meter Bidding Won by Shenzhen Kaifa Technology by Type of Smart Meter and Batch of Bidding, 2010-2011
- Share of SGCC Smart Meter Bidding Won by Shenzhen Kaifa Technology by Type of Smart Meter and Batch of Bidding, 2010-2011
- Operating Revenue and Total Profit of Narada Power Source, 2008-2011
- Operating Revenue of Narada Power Source by Region, 2008-2011
- Operating Revenue of Narada Power Source by Product, 2010-2011
- Production and Sales of Narada Power Source by Product, 2011-2013E
- Operating Revenue and Total Profit of EVE Energy, 2008-2011
- Operating Revenue of EVE Energy by Product, 2008-2011
- Operating Revenue of EVE Energy by Region, 2010-2011
- Traditional Substation Automation Market Share, 2011
- Smart Substation in SGCC Protective Equipment Bidding, 2011
- List of Substations in SGCC Equipment Integration Bidding, 2011
- Operating Revenue and Total Profit of Guodian Nanjing Automation, 2008-2011
- Operating Revenue of Guodian Nanjing Automation by Product, 2008-2011
- Operating Revenue of Guodian Nanjing Automation by Region, 2008-2011
- Operating Revenue and Total Profit of XJ Electric, 2008-2011
- Operating Revenue of XJ Electric by Product, 2008-2011
- Operating Revenue of XJ Electric by Region, 2008-2011
- Key Digital Substation Project of NARI-Relays Electric
- China's Industrial SVC Market Capacity, 2007-2012E
- Operating Revenue and Total Profit of RXPE, 2008-2011
- Operating Revenue of RXPE by Product, 2008-2011
- Operating Revenue of RXPE by Region, 2008-2011



- Operating Revenue and Total Profit of Sieyuan Electric, 2008-2011
- Operating Revenue of Sieyuan Electric by Product, 2008-2011
- Operating Revenue of Sieyuan Electric by Region, 2008-2011
- Public Transportation and Public Charging Equipment Investment Structure in China, 2011
- Operating Revenue and Total Profit of ATC, 2008-2011
- Operating Revenue of ATC by Product, 2008-2011
- Operating Revenue of ATC by Region, 2008-2011
- Market Shares of China's Top Four DC Operation Power Supply Equipment Companies, 2011
- Smart Scheduling Market Capacity in China during the 12th Five-Year Plan Period (2011-2015)
- Operating Revenue and Total Profit of NARI-TECH, 2008-2011
- Operating Revenue of NARI-TECH by Product, 2009-2011
- Operating Revenue of NARI-TECH by Region, 2009-2011
- Operating Revenue and Total Profit of DFE, 2008-2011
- Operating Revenue of DFE by Product, 2008-2011
- Operating Revenue of DFE by Region, 2008-2011
- Operating Indicators of Main Smart Grid Equipment Companies in China, 2010-2011

**You can place your order in the following alternative ways:**

1. Order online at [www.researchinchina.com](http://www.researchinchina.com)
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: [report@researchinchina.com](mailto:report@researchinchina.com)
4. Phone us at +86 10 82600828/ 82601561

<b>Party A:</b>			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

<b>Party B:</b>			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

**Choose type of format**

Hard copy	.....2,000 USD
PDF (Single user license)	.....1,900 USD
PDF (Enterprisewide license)	..... 3,100 USD

**※ Reports will be dispatched immediately once full payment has been received.**  
**Payment may be made by wire transfer or credit card via PayPal.**