

China Smart Grid Equipment Industry Report, 2012-2013

June 2013

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

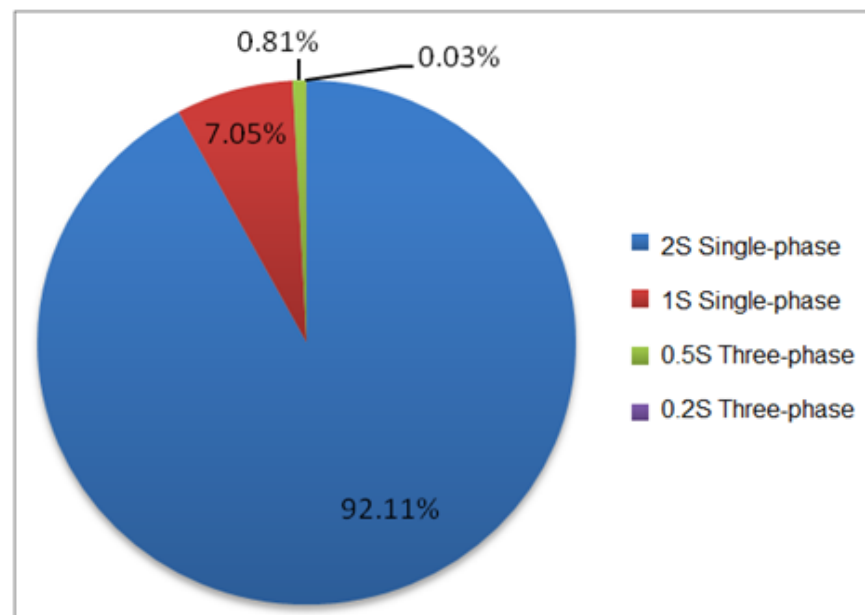
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

According to the investment program of the 12th Five –Year Plan for Grid Intelligence Construction of State Grid Corporation of China (SGCC), segments of communication information, electricity consumption and substation hold the largest portions of investments, being 28.3%, 27.3% and 23.6%, respectively. Among the smart grid equipment bid invitation, smart meter and smart substation take the dominant position.

In point of smart meter market, in 2012, the volume of smart meter bid invitation occupied 97.18% of the total meter bidding amount, a jump from 89.01% in 2011. The annual smart meter bid invitation volume reached 76,043,000 sets, among which, 2S single-phase smart meter took the lead, grabbing 92.1% of the total. Presently, smart meter bid invitation market of SGCC features a rather lower concentration ratio. Take 2S single-phase smart meter market as an example, market shares of the top three companies, Wasion Group, Linyang Electronics and Ningbo Sanxing, are all less than 6%.

SGCC's Bid Invitation Structure by Sundry Smart Meter in 2012



Source: SGCC; ResearchInChina China Smart Grid Equipment Industry Report, 2012-2013

Seen from the field of smart substation equipment, 2012 saw great bid invitation growth of smart substation of SGCC, over 1,000 in the year around, and far higher than 283 in 2011. And bidding proportion of smart substation equipment further rose. Among the power transmission & transformation secondary equipment bidding success of SGCC, intelligence rate of protection equipment bidding invitation reached 74.35%, and that of monitoring equipment 69.39%.

In addition to the market size, major enterprises and prospects of the two market segments, smart meter and smart substation equipment, China Smart Grid Equipment Industry Report, 2012-2013 also highlights main market segments such as energy storage product, smart grid scheduling, flexible transmission and electric vehicle charging station as well as related major companies.

In 2012, Linyang Electronics ranked top three among all the bidding invitations of the four batches of 2S single-phase meter of SGCC. At present, the company is capable of producing 80,000 single-phase meters and 10,000 three-phase meters daily. It boasts significant advantage of scale and strong cost control.

In 2012, Guodian Nanjing Automation (600268) harvested revenue of RMB4.147 billion, an increase of 29.43% YOY, and made net income of RMB308 million, a growth of 20.65% from a year earlier. General contracts of power transmission and transformation increased sharply in 2012, from which the revenue reached RMB131 million, soaring by 106.75% yr-on-yr.

1. Development of Smart Grid Equipment in China

- 1.1 Smart Grid
- 1.2 Industrial Restructuring Being Driving Motive
- 1.3 China's Smart Grid Construction has Entered Comprehensive Construction Stage

2. Smart Meter Market

- 2.1 Smart Meter
- 2.2 Market Overview
- 2.3 Electric Meter Bid Winning of SGCC in 2012
- 2.4 Market Concentration
 - 2.4.1 2S Single-phase Smart Meter
 - 2.4.2 Three-phase Smart Meter
 - 2.4.3 Concentrator & Collector
 - 2.4.4 Acquisition Terminal of Special Transformer

3. Energy Storage Products Market

- 3.1 Energy Storage Technology
- 3.2 Status Quo
- 3.3 Development Outlook

4. Intelligent Substation Market

- 4.1 Definition of Intelligent Substation
- 4.2 Composition of Intelligent Power Station
- 4.3 Chinese Market
 - 4.3.1 Biddings of Secondary Equipment
 - 4.3.2 Development of Primary Equipment

- 4.3.3 Electronic Mutual Inductor
- 4.4 SGCC Intelligent Substation Plan

5. Flexible Power Transmission Market

- 5.1 Flexible Power Transmission
- 5.2 Reactive Power Compensation Technology
- 5.3 Market Forecast of Reactive Power Compensation Products in Smart Grid Field

6. Electric Vehicle Charging Equipment Market

- 6.1 Status Quo in China
- 6.2 National Planning
- 6.3 Development of Electric Vehicle Charging Facilities in Major Provinces of China
 - 6.3.1 Rapid Charging Technology
 - 6.3.2 Intelligence & High-efficiency Technology
 - 6.3.3 General Integration Technology
 - 6.3.4 Battery Leasing Services

7. Smart Scheduling Market

- 7.1 Basic Structure of Smart Scheduling System
- 7.2 Automation of Smart Scheduling in China
- 7.3 Prospect of China's Smart Scheduling Market

8. Key Companies

- 8.1 Wasion Group Holdings Limited
 - 8.1.1 Profile
 - 8.1.2 Operation

- 8.1.3 Revenue Structure
- 8.1.4 Dynamics
- 8.1.5 Development Plan
- 8.2 Ningbo Sanxing Electric Co., Ltd.
- 8.3 Jiangsu Linyang Electronics Co., Ltd.
- 8.4 Huazhi Holding (Zhejiang) Co., Ltd.
- 8.5 Shenzhen Clou Electronics Co., Ltd.
- 8.6 Shenzhen Haoningda Meters Co., Ltd.
 - 8.6.1 Profile
 - 8.6.2 Operation
 - 8.6.3 Revenue Structure
 - 8.6.4 Gross Margin
 - 8.6.5 Dynamics
 - 8.6.6 Development Plan
 - 8.6.7 Development Prospects
- 8.7 Shenzhen Kaifa Technology Co., Ltd.
- 8.8 Integrated Electronic Systems Lab Co., Ltd.
- 8.9 Zhejiang Narada Power Source Co., Ltd.
- 8.10 Guodian Nanjing Automation Co., Ltd.
- 8.11 XJ Electric Co., Ltd.
- 8.12 Rongxin Power Electronic Co., Ltd.
- 8.13 Sieyuan Electric Co., Ltd.
- 8.14 Shenzhen Auto Electric Power Plant Co., Ltd.
- 8.15 NARI Technology Development Limited Company
- 8.16 Dongfang Electronics Co., Ltd.

- 
- Investment Plan of SGCC, 2011-2015E
 - Single-phase Smart Meter & Three-phase Smart Meter
 - Investment Proportion in Smart Grid Power Utilization
 - SGCC Smart Meter Investment, 2011-2014E
 - SGCC Smart Meter Bid Winning Results, 2010-2012
 - SGCC Concentrator Collector and Transformer Acquisition Terminal Bid Winning Results, 2011-2012
 - SGCC Bidding Proportion of Different Smart Meters in 2012
 - SGCC 2S Single-phase Smart Meter Bid Winning Results in 2012
 - SGCC Three-phase Smart Meter Bid Winning Results in 2012
 - SGCC Three-Phase Smart Meter Bid Winning Results in 2012
 - SGCC Transformer Acquisition Terminal Bid Winning Results in 2012
 - Application Cases of Mature Energy Storage Technology
 - Major Energy Storage Methods and Technical Features
 - Applications of Lead-Acid Battery
 - Application of Li-ion Battery
 - Cost of Different Energy Storage Methods
 - Structure and Function of Intelligent Substation
 - Bidding Volume of Conventional Protection Equipment and Intelligent Protection Equipment, 2011-2012
 - Status Quo of Intelligent Transformation Industry
 - Current Development of Intelligent Transformation Industry
 - Research and Manufacture of Electronic Mutual Inductor
 - SGCC Twelfth Five-year Plan of Substation
 - Revenue and Net Income of Wasion Group Holdings Limited, 2009-2012
 - Revenue of Wasion Group Holdings Limited by Product in 2012
 - Gross Margin of Wasion Group Holdings Limited by Product, 2009-2012

- 
- Revenue and Net Income of Ningbo Sanxing, 2009-2012
 - Revenue of Ningbo Sanxing by Product, 2009-2012
 - Revenue of Ningbo Sanxing by Region, 2009-2012
 - Gross Margin of Ningbo Sanxing by Product, 2009-2012
 - Revenue and Net Income of Linyang Electronics, 2009-2012
 - Revenue of Linyang Electronics by Product, 2009-2012
 - Revenue of Linyang Electronics by Region, 2009-2012
 - Gross Margin of Linyang Electronics by Product, 2009-2012
 - Revenue and Net Income of Linyang Electronics, 2012-2014E
 - Revenue and Net Income of Huazhi Holding, 2009-2012
 - Revenue of Huazhi Holding by Product, 2009-2012
 - Revenue of Huazhi Holding by Region, 2009-2012
 - Gross Margin of Huazhi Holding by Product, 2009-2012
 - Revenue and Net Income of Clou Electronics, 2009-2012
 - Clou Electronics' Revenue from Top Five Customers in 2012
 - Clou Electronics' Procurement from Top Five Suppliers in 2012
 - Revenue of Clou Electronics by Product, 2009-2012
 - Revenue of Clou Electronics by Region, 2009-2012
 - Gross Margin of Clou Electronics by Product, 2009-2012
 - Delayed Projects of Clou Electronics, 2012-2013
 - Revenue and Net Income of Clou Electronics, 2012-2014E
 - Revenue and Net Income of Shenzhen Haoningda Meters Co., Ltd., 2009-2012
 - Shenzhen Haoningda Meters' Revenue from Top Five Clients in 2012
 - Shenzhen Haoningda Meters' Procurement from Top Five Suppliers in 2012

- 
- Revenue of Shenzhen Haoningda Meters by Product, 2009-2012
 - Gross Margin of Shenzhen Haoningda Meters by Product, 2009-2012
 - Revenue and Net Income of Shenzhen Haoningda Meters, 2012-2014E
 - Revenue and Net Income of Shenzhen Kaifa, 2009-2012
 - Revenue of Shenzhen Kaifa by Product, 2009-2012
 - Revenue of Shenzhen Kaifa by Region, 2009-2012
 - Gross Margin of Shenzhen Kaifa by Product, 2009-2012
 - Fundraising Investment Projects of Shenzhen Kaifa in 2012
 - Revenue and Net Income of Shenzhen Kaifa, 2012-2014E
 - Revenue and Net Income of Integrated Electronic, 2009-2012
 - Revenue of Integrated Electronic by Product, 2009-2012
 - Revenue of Integrated Electronic by Region, 2009-2012
 - Gross Margin of Integrated Electronic by Product, 2009-2012
 - Revenue and Net Income of Integrated Electronic, 2012-2014E
 - Revenue and Net Income of Narada Power Source, 2009-2012
 - Revenue of Narada Power Source by Product, 2009-2012
 - Revenue of Narada Power Source by Region, 2009-2012
 - Gross Margin of Narada Power Source by Product, 2009-2012
 - Revenue and Net Income of Narada Power Source, 2012-2014E
 - Revenue and Net Income of Guodian Nanjing Automation, 2009-2012
 - Revenue of Guodian Nanjing Automation by Product, 2009-2012
 - Gross Margin of Guodian Nanjing Automation by Product, 2009-2012
 - Revenue and Net Income of Guodian Nanjing Automation, 2012-2014E
 - Revenue and Net Income of XJ Electric, 2009-2012

- 
- XJ Electric's Revenue from Top Five Clients in 2012
 - XJ Electric's Procurement from Top Five Suppliers in 2012
 - Revenue of XJ Electric from New Products, 2012
 - Gross Margin of New Products of XJ Electric, 2012
 - Revenue and Net Income of XJ Electric, 2012-2014
 - Revenue and Net Income of Rongxin, 2009-2012
 - Gross Margin of Rongxin by Product, 2009-2012
 - Revenue and Net Income of Rongxin, 2012-2014E
 - Revenue and Net Income of Sieyuan Electric, 2009-2012
 - Revenue of Sieyuan Electric by Product, 2009-2012
 - Revenue of Sieyuan Electric by Region, 2009-2012
 - Gross Margin of Sieyuan Electric by Product, 2009-2012
 - Revenue and Net Income of Sieyuan Electric, 2012-2014E
 - Revenue and Net Income of Auto Electric, 2009-2012
 - Revenue of Auto Electric by Product, 2009-2012
 - Gross Margin of Auto Electric by Product, 2009-2012
 - Revenue and Net Income of Auto Electric, 2012-2014E
 - Revenue and Net Income of NARI, 2009-2012
 - Revenue of NARI by Product, 2009-2012
 - Revenue and Net Income of Dongfang Electronics, 2009-2012
 - Revenue of Dongfang Electronics by Product, 2009-2012
 - Revenue of Dongfang Electronics by Region, 2009-2012
 - Gross Margin of Dongfang Electronics by Product, 2009-2012
 - Revenue and Net Income of Dongfang Electronics, 2012-2014E

You can place your order in the following alternative ways:

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

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party 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
Total		

Choose type of format

PDF (Single user license)2,200 USD
 Hard copy 2,300 USD
 PDF (Enterprisewide license)..... 3,400 USD

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