



**China Smart Meter Industry
Report, 2014-2018**

Oct. 2014

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.

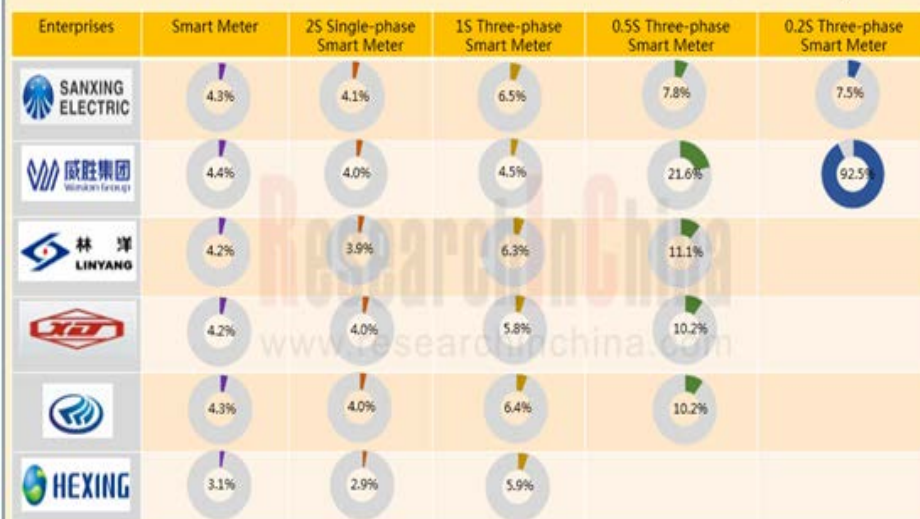
Abstract

Smart meter is fundamentally equipped in smart grid. The advancing smart grid construction in China spurred the constant growth of smart meter demand. By the end of 2013, 370 million smart meters had been accumulatively installed in China, and the figure is expected to hit 500 million in 2015.

SGCC invited tenders for smart meter as early as 2009 and as of Sept. 2014, 21 tenders for a total of 310 million smart meters were invited, in which 3 tenders for 61.877 million smart meters, close to the level (62.16 million) in the whole 2013, were completed during Jan.-Sept. 2014.

Besides meeting the domestic demand, the home-made smart meters are also exported to more than 130 countries and regions worldwide. In 2013, the export volume of smart meter topped 608,000 (surging by 17.1% yr-on-yr), in which 37.7% was exported to Germany, 17.3% to Vietnam, and 8.0% to the Netherlands.

Market Share of China Main Smart Meter Manufacturers , Jan.-Sept. 2014



Remark : According to bid statistics of SGCC

Source : China Smart Meter Industry Report, 2014-2018 ; ResearchInChina

Major players in China smart meter industry consist of Wasion Group Holdings Limited, Ningbo Sanxing Electric Co., Ltd., Jiangsu Linyang Electronics Co., Ltd., etc. During 2009-2013, the aforementioned three companies separately swept an average market share (by bid-winning amount, similarly hereinafter) of 5.6%, 6.2% and 5.2% in the 2S single-phase smart meter market and 9.9%, 8.8% and 8.1% in the three-phase smart meter market.

The three-phase smart meter can be largely categorized into 1S, 0.5S and 0.2S. In 2013, amid the 1S three-phase smart meter companies, Ningbo Sanxing Electric Co., Ltd. boasted the largest market share of approximately 8.5%; among the 0.5S three-phase smart meter companies, Yantai Dongfang Wisdom Electric Co., Ltd. held the first place with about 17.5% market share; and within the 0.2S three-phase smart meter enterprises, the largest market share of 61.1% or so was grabbed by Ningbo Sanxing Electric Co., Ltd.

Besides consolidating the existing market share, the enterprises, represented by Wasion Group Holdings Limited, strive to further improve their market competitiveness by dint of industry chain extension, capacity expansion, etc.

In May 2014, Wasion Group Holdings Limited spent RMB52.9 million in acquiring roughly 66% equity of Wuhan Smart Electrical Co., Ltd.; and in the following month, it took over 65% equity of Hunan Switchgear Co., Ltd. at a price of RMB50 million, by which Wasion Group Holdings Limited ran through the smart power distribution industry chain.

In July 2014, Phase I of Huizhou Smart Grid & Internet of Things (IoT) Project (with investment of RMB1.15 billion) of Shenzhen Haoningda Meters Co., Ltd. was put into production, which increased capacity by 7.5 million single-phase smart meters and 1.5 million three-phase smart meters each year. Phase II will start construction in July, 2015 as planned and when it is put into production in Dec. 2016 as scheduled, 500,000 more smart water meters and acquisition terminals as well as 1.5 million more IoT RFID reading device series products will be annually manufactured.

Additionally, Hangzhou Sunrise Technology Co., Ltd. was formally listed on the Shenzhen Stock Exchange in Jan. 2014, and the raised fund was utilized to expand capacity of smart meter and power utilization information acquisition system. When the projects all reach the designed capacity, the annual capacity of the company will be lifted by 800,000 three-phase smart meters, 2.8 million single-phase smart meters and 400,000 sets of power utilization data collection system.

China Smart Meter Industry Report, 2014-2018 of ResearchInChina emphasized the followings:

- Smart meter development environment in China (including international and domestic environment);
- Size, structure, competitive landscape, import & export, etc. of China smart meter market;
- Smart meter tender invitation scale, tender structure, construction planning, etc. of SGCC;
- Status quo, competitive landscape, risks, trends, etc. in tender market segments of SGCC;
- Operation and winning in smart meter tenders invited by SGCC of 20 Chinese smart meter players.

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