

China Smart Meter Industry Report, 2017-2021

Nov. 2017

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

Under the influencing factors like “Collective Reading of Four Meters (water, electricity, gas and heat meters)”, differential pricing as well as the evolution of Internet of Things, China’s smart meter industry has developed rapidly. In 2016, the total shipment of smart meters in China was 280 million pieces with a CAGR of 20.5% from 2011 to 2016. With further penetration of smart meters in various fields, the market growth will slow down in the future and it is estimated that shipments during 2017-2021 will show an AAGR of above 10.0%.

In terms of market segments, the smart electric meter market is currently the most mature in China, with its shipment making up over 70% of total smart meter shipments in 2016. Additionally, the smart electric meter market boasted the highest penetration rate, namely over 90%, followed by smart gas meter with 55%; meanwhile, smart water meters and smart heat meters saw less than 20% each.

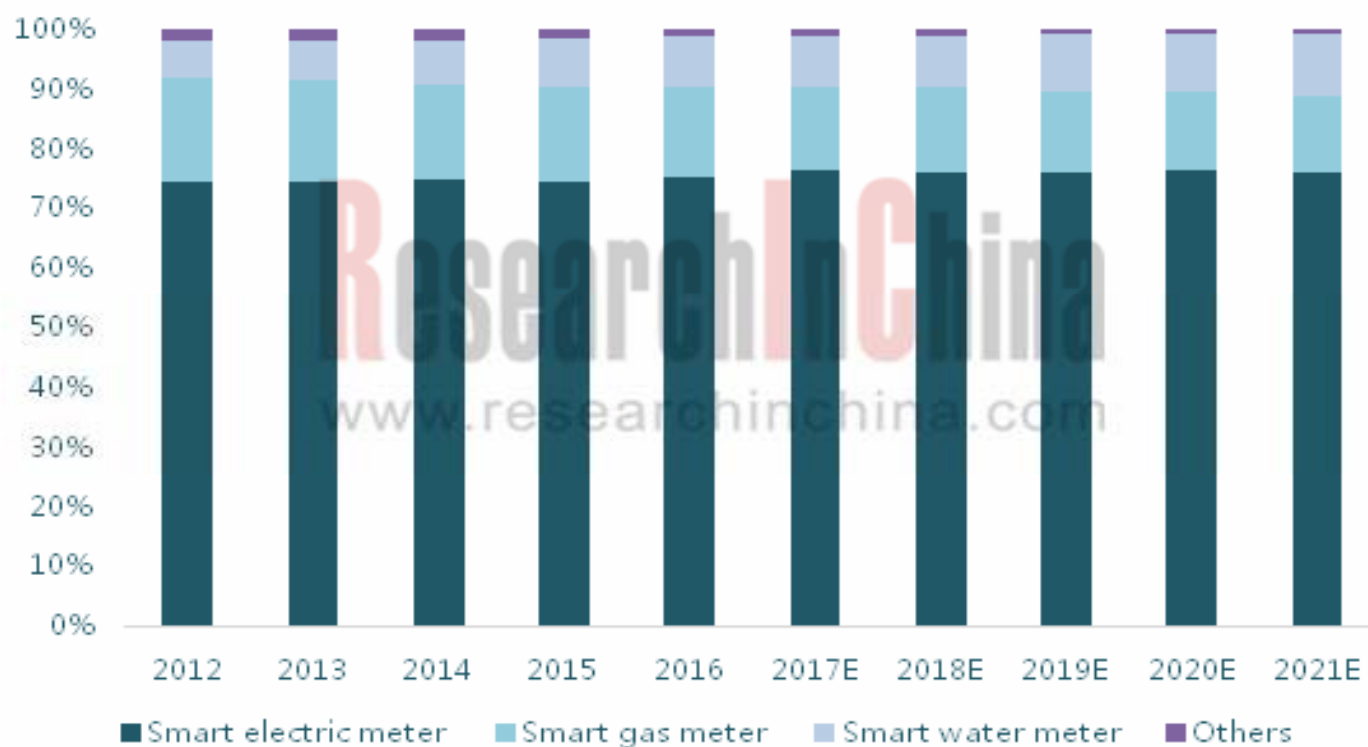
Smart Electric Meter: China's shipment of smart electric meter hit 130 million pieces in 2016 with a CAGR of 7.1% between 2011 and 2016. The open bidding is mainly invited by State Grid and China Southern Power Grid, targeting 2S single-phase smart electric meters (bids account for over 85%). Due to the near-saturation of the smart electric meter retrofit market, the growth mainly comes from newly-built residential buildings; however, China has lowered the real estate growth goal again during the "13th Five-Year Plan" period (2016-2020). Therefore, it is estimated that the shipment CAGR in 2017-2021 will be between 3%-5%.

Smart Water Meter: China's shipment of smart water meter was 18.49 million pieces in 2016 with a CAGR of 20.2% from 2011 to 2016. Due to the relatively low penetration rate, the demand in the smart water meter market will climb steadily under the impetus of “Smart Water” in the coming years, and shipments is expected to be 21.03 million pieces in 2017 and 34 million pieces in 2021.

Smart Gas Meter: Facilitated by the national policy, the traditional gas meters are gradually transformed into smart ones, conducting to the boom of smart gas meter market. In 2016, the shipment of smart gas meters in China reached 23.37 million pieces with a CAGR of 26.2% during 2011-2016. In the future, with the expedited process of converting coal to gas, the demand for smart gas meters will continue to ascend and shipments will present an AAGR of at least 15% between 2017 and 2021.

Heat meter: Mostly used in northern China, the heat meter grows slowly in an immature market and an industry without uniform standards compared with several other smart meters. Shipments for 2016 were 3.31 million pieces, edging up 1.2% from a year earlier. Some southern cities have expressed their intention to provide heating in winter, a move that creates new demand for heat meter if the idea comes true.

Chinese Smart Meter Market Structure, 2012-2021E



Major global smart meter producers include Itron and Xylem (United States), Diehl (Germany), Landis +Gyr (Switzerland), and Ningbo Sanxing Medical Electric, Wasion Group, Sanchuan Wisdom Technology, Goldcard Smart Group and Suntront Technology (China). Itron, Xylem, Elster, Wasion Group, and Suntront Technology provide products covering water, electricity, gas and heat fields, while most of the rest get involved in only one or two segments.

Smart meter industry is lowly concentrated in China with CR10 standing at only 37.9% in 2016. The industry leader- Ningbo Sanxing Medical Electric occupies a market share of less than 10%. By market segment, smart electric meter, smart water meter and smart gas meter all see a low concentration with CR10 being merely around 20% in 2016.

China Smart Meter Industry Report, 2017-2021 highlights the followings:

- ◆ Smart meter (definition, classification, characteristics, business model, technical path, etc.);
- ◆ Smart meter in China (development environment, market size, market structure, competitive landscape, development prospects, etc.);
- ◆ Smart electric meter industry in China (policies, market size, market structure, competitive landscape, import & export, development trends, etc.);
- ◆ Global and Chinese smart water meter markets (size, pattern, etc.);
- ◆ Global and Chinese smart gas meter markets (size, pattern, etc.);
- ◆ Global and Chinese heat meter markets (size, structure, competitive landscape, etc.);
- ◆ Six foreign and sixteen Chinese smart meter producers (operation, smart meter business, etc.)

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