



**China Smart Meter Industry Report,
2019-2025**

Feb.2019

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

As the internet of things (IoT) penetrates into the public utility sectors, charging by meters helps smart meter industry grow at a solid pace. China's shipments of smart meters ranged at 200 million units in 2018, at a CAGR of 6.8% during 2013-2018, a rate which is expected to stay at 6.5% between 2019 and 2025.

In terms of market segments, smart electric meter boasts the highest penetration in China, sweeping around 70.0% of the market, but its slower growth, a result that the upgrading and replacement draw to a close, will lead to a declining market share; smart water and gas meters which are being deployed on large scale, however, will be the main growth drivers in the near future.

Smart Electric Meter: In the market, bids are invited by State Grid Corporation of China (seizing at least 80% market shares) and China Southern Power Grid. State Grid saw electric meter procurement slump in 2017 versus previous years for it has finished deployment of smart meters in recent two years, which means future demand will be from new users and those who need replacement. It is predicted that China's installations of smart electric meters will grow at an average rate of virtually 3.5% each year from 2019 to 2025.

Smart Gas Meter: In 2018, smart gas meter shipments in China surged by 13.7% to roughly 54.1 million units on the previous year, with a penetration of as high as 60.1%; as the "coal to gas" campaign is under way, the increasing consumption of natural gas conduces to the rising demand for smart gas meters whose shipments will expectedly outstrip 70 million units in 2025.

Smart Water Meter: In China, penetration of smart water meters remains low, no more than 30%, leaving huge space to grow. That's because the dispersed distribution of water companies makes it hard to manage meters in a centralized way. In 2018, more than 24 million smart water meters were shipped in China, 13% more than in the previous year. It is predicted that driven by the release of new houses and buildings and the replacement in the established real estate market, smart water meter market will enjoy a growth rate of 10%-15% between 2019 and 2025.

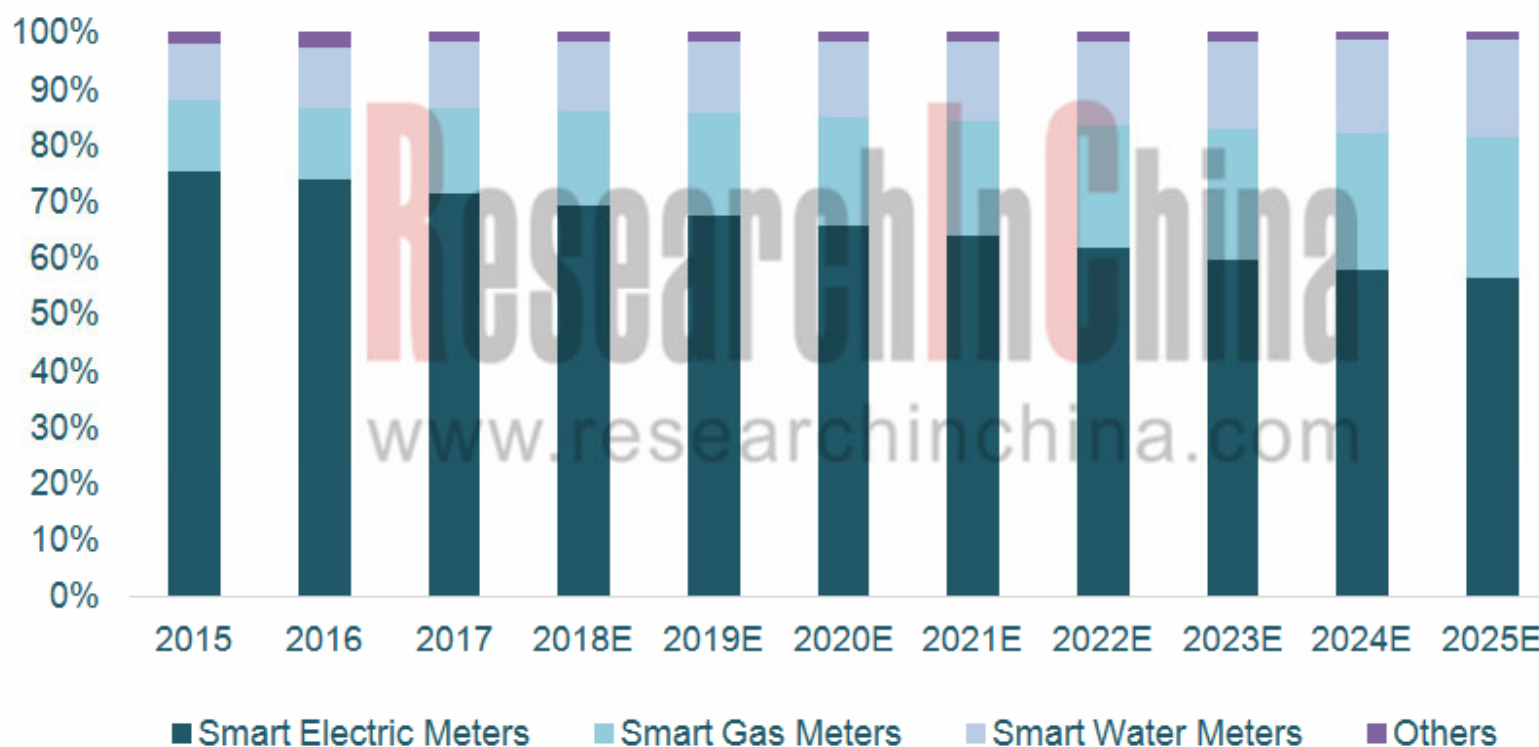
Heat Meter: The market size of heat meter which is mostly used in northern China, remains small. Before reaching estimated 3.65 million units in 2019, China's sales of heat meters stood at around 3.51 million units in 2018, a figure projected to outnumber 4.5 million in 2025. Heating by renewable energy will be a trend in China in the upcoming years due in part to the implementation of environment protection policies.

In China, smart meter manufacturers are led by Ningbo Sanxing Medical Electric, Jiangsu Linyang Energy, Shaanxi Aerospace Power Hi-Tech, Goldcard Smart Group, Suntront Technology and Huizhong Instrumentation. The CR10 of smart meter industry hovered at 40% in 2018. By market segment, the numerous manufacturers of smart electric and water meters produced a low market concentration, with CR5 below 20% in the year.

China Smart Meter Industry Report, 2019-2025 highlights the following:

- Smart meter (definition, classification, business model, technology roadmap, etc.);
- Instrument & meter industry (global and China market size, market structure, etc.);
- Smart meter industry (policies, market size, market structure, competitive pattern, prospects, etc.);
- Market segments (smart electric meter, smart water meter, smart gas meter and heat meter) (overview, market size (global and China), market structure, import and export, competitive pattern, development trends, etc.);
- 6 foreign and 17 Chinese smart meter manufacturers (operation, smart meter business, etc.).

Smart Meter Market Structure in China, 2015-2025E



Source: ResearchInChina

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