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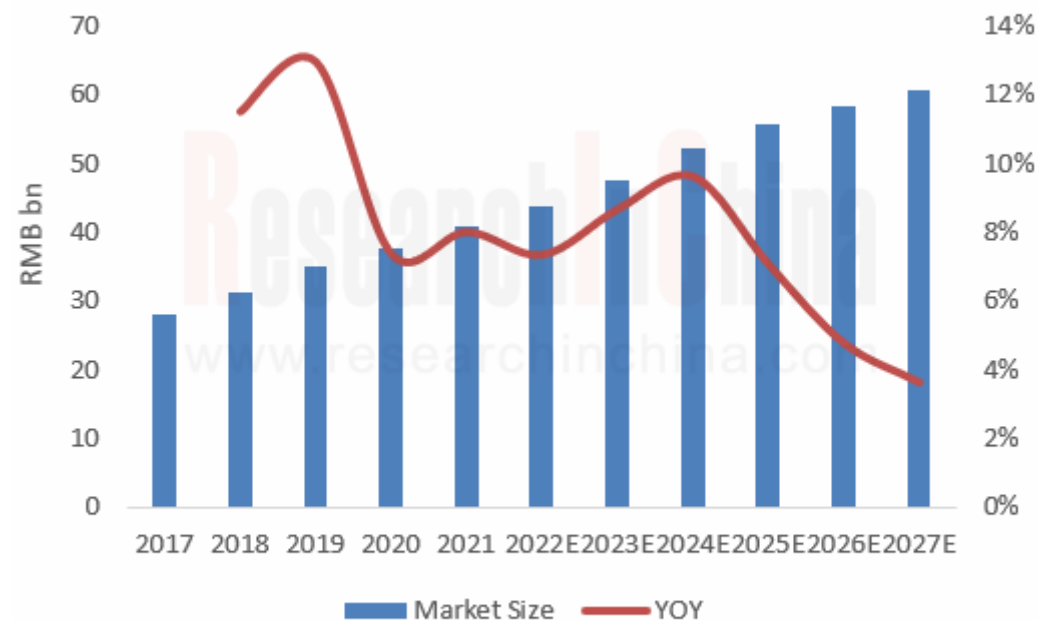
Global and China Smart Meters Industry Report, 2022-2027

June 2022

Market Size of Smart Meters in China

Meters are widely used in the national economy and are an important part of metering to promote the development of metering. As a legal measuring tool, meters are mainly used in the supply process of water, heat, gas, electricity and oil and other similar gases or liquids, and are widely used in factories, governments, residential communities, schools, enterprises and many other fields where user groups are concentrated. Compared with traditional mechanical meters, smart meters have obvious advantages in measurement accuracy, wear resistance, anti-interference and other measurement performance. The maturity of their production processes and large-scale mass production are inseparable from flow measurement technology, sensing and signal collection technology, material application and structural design technology and many other technological development and progress. The market popularization rate and penetration of smart meter products have also been continuously improved with the progress of material technology and industrial technology. In 2021, the scale of China's smart meter market reached 40.47 billion yuan, an increase of 8.0% year on year. With the continuous development of new technologies such as the Internet of Things and big data technology, and the upgrading of smart meters, the market will further develop. It is expected that the market size will reach 60.55 billion yuan in 2027, and the compound annual growth rate from 2021 to 2027 will reach 8.2%.

Market Size of Smart Meters in China, 2017-2027E

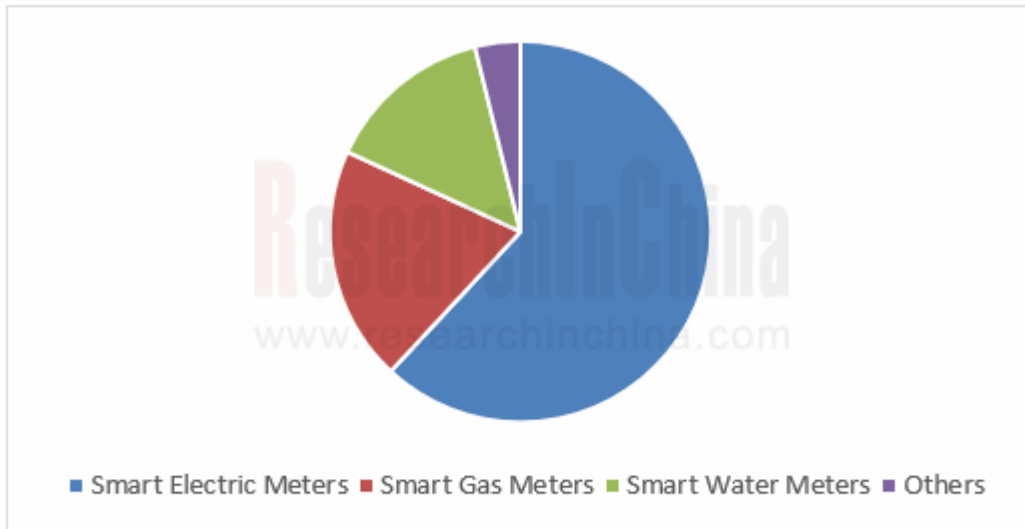


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Smart Meter Shipment

In terms of market segmentation, in 2021, China's smart electric meter shipments reached 242 million, accounting for 61.9% of total smart meter shipments; smart water meter shipments reached 35 million, accounting for 14.3%; smart gas meter shipments reached 48 million, accounting for about 20.0%; shipments of other meters, including heat meters, reached about 9.3 million, accounting for about 3.9%.

Distribution of Smart Meter Shipments in China, 2021

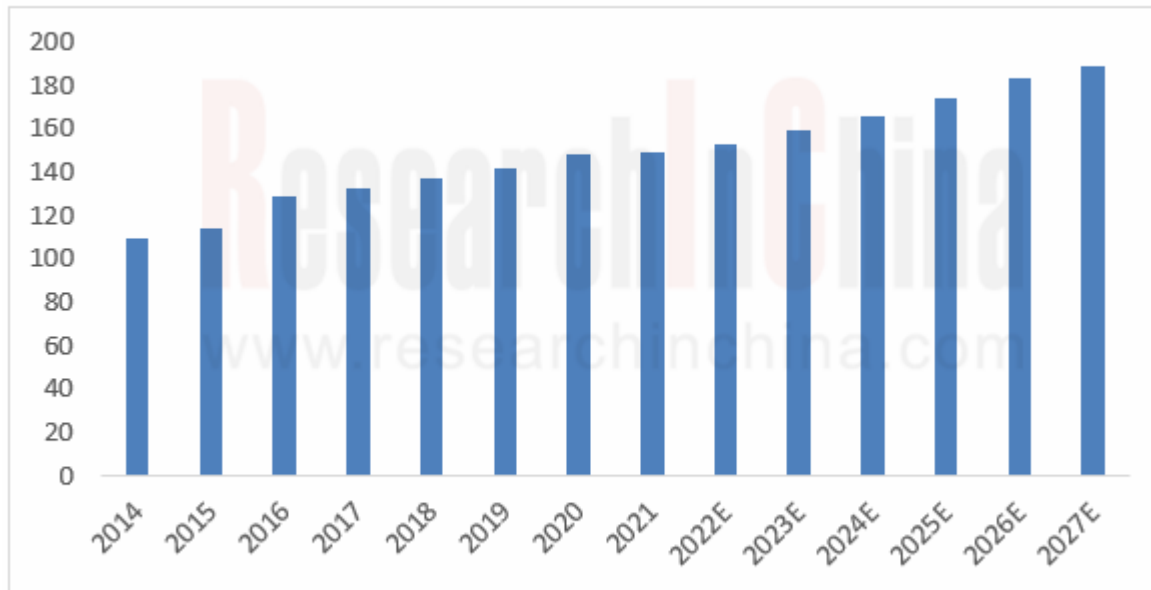


Source: ResearchInChina

In September 2020, China clearly put forward the goal of "peak carbon dioxide emissions" by 2030 and "carbon neutrality" by 2060. In order to achieve this goal, China is striving to build a clean, low-carbon, safe and efficient energy system, improve the level of clean energy use and power system operational efficiency, and the use of smart electric meters will be an important part of it. In August 2020, the State Grid Corporation of China released the general technical specifications for smart electric meters and smart IOT electric meters. The smart IOT electric meter is a high-configuration version of the meter type, which fully meets the requirements of IR46 standard at the standard adaptability level and completely adopts modular design, divided into metering module, management module, and expansion module, with richer product function design. It is expected that smart IoT electric meters will gradually become the emerging mainstay of this market in the near future. It is expected that by 2027, China's smart electric meter shipments will reach 189 million, of which 40 million will be IoT smart electric meters.

Smart Electric Meter Shipment

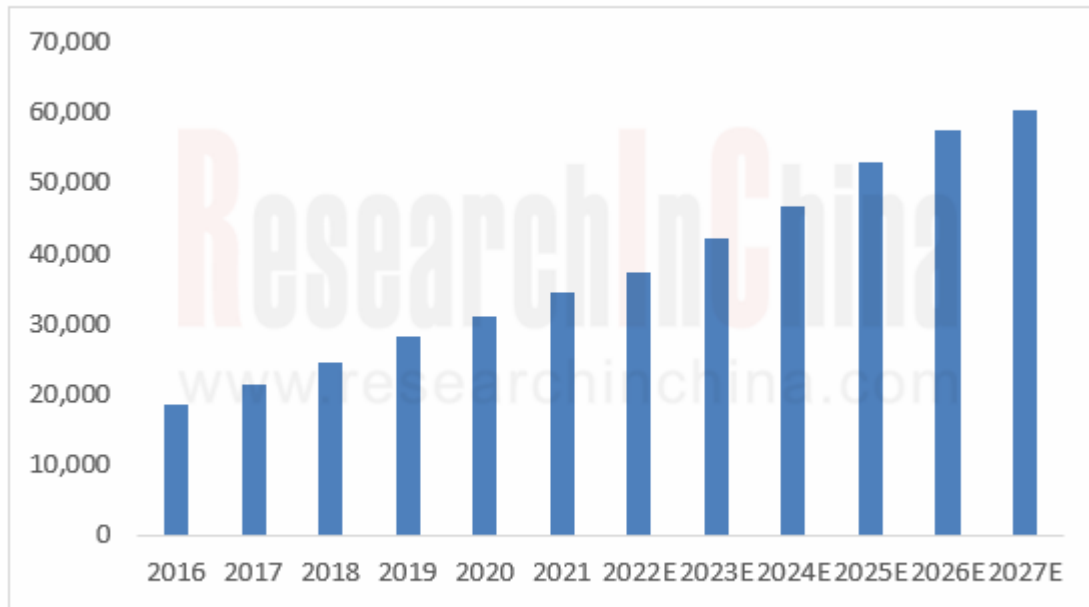
Smart Electric Meter Shipments in China, 2014-2027E



Source: ResearchInChina

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Smart Water Meter Shipments in China, 2016-2027E

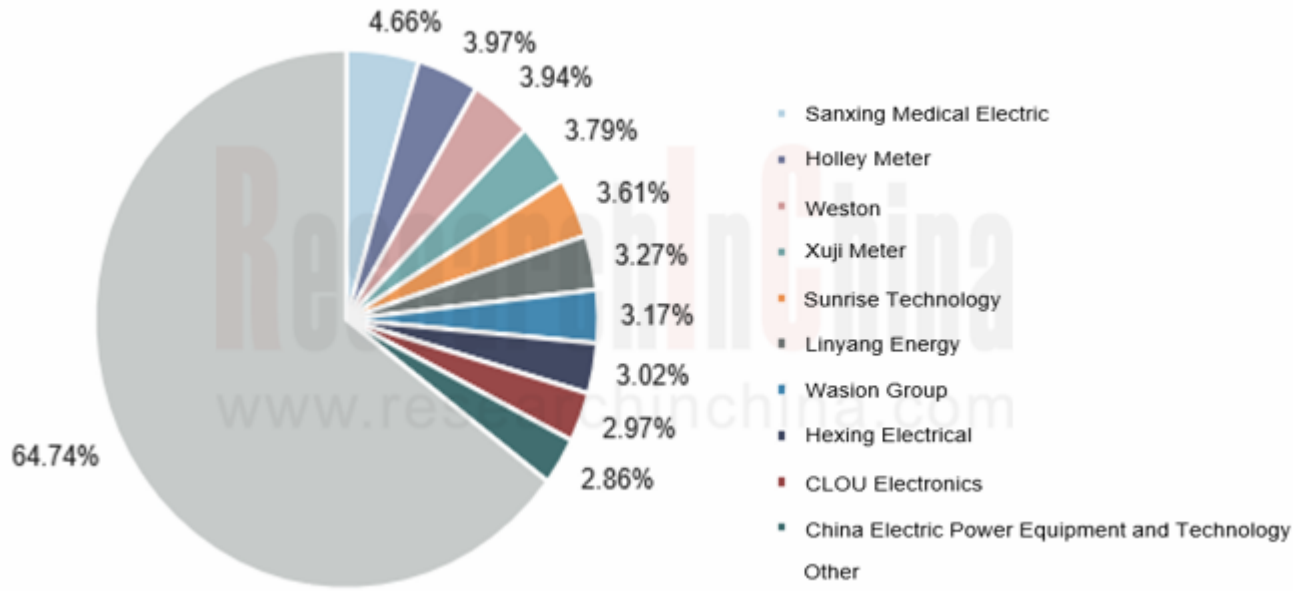


Source: ResearchInChina

The leakage rate of China's urban water supply network has long been high. To achieve the goal of water and energy conservation, the notice on strengthening leakage control of public water supply network recently issued by the Ministry of Housing and Urban-Rural Development and the National Development and Reform Commission requires that by 2025, the leakage rate of public water supply network in cities nationwide will strive to be controlled within 9%. To achieve this goal, the application and popularization of smart water meters is imperative, and shipments in this market are expected to reach 60.4 million units by 2027.

In the field of smart water meters, Ningbo Water Meter has long occupied the top of this market, with market share reaching 12.1% in 2021; Suntront Technology followed, with a share of about 6.5%; Sanchuan Smart ranked third, with a share of about 6.3%.

Smart Electric Meter Market Landscape of State Grid Tender, 2021 (%)



In recent years, with the rapid development of the national economy, the issue of changing the energy structure and improving atmospheric quality has attracted widespread attention from the government and all sectors of society. Natural gas is becoming increasingly popular as a clean, efficient and inexpensive energy source, and local governments are also increasing the laying of gas pipeline networks at the county level and even in township areas, accelerating the promotion and application of smart gas meters, which are expected to reach 75.7 million units by 2027.

In terms of competition landscape, the smart meter industry is generally less concentrated, and the foreign capital substitution rate is relatively high. Domestic manufacturers have a high degree of fit with downstream municipal utility industry application providers in product design and occupy a high dominant position. The smart electric meter industry is mainly dominated by Sanxing Medical Electric, Holley Meter, and Weston, which takes market share of 4.66%, 3.97% and 3.94% in State Grid tender respectively in 2021. The top ten manufacturers accounts for about 35% of the market.

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