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China Power Transformer Industry Report, 2010-2011

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Abstracts

In 2010, with the fade-out of China's national economic stimulus plan, China's power grid investment fell to RMB341 billion, down 11.36% year on year. As a result, the demand in Chinese transformer market decreased in 2010. The centralized bidding capacity of State Grid for 220kv and above power transformers has declined for two consecutive years to 150337 MVA, down 25.22% year on year.

In 2011, the bidding for 220kv and above power transformers in the first four centralized bids invited by State Grid dropped down by 11.85% year on year. The bidding capacity is expected to fall further throughout the year.

In terms of the structure of China transformer market, although China has strengthened super-high and ultra-high voltage power grid construction in recent years, 500kv and above power transformers only occupy a small share in the power transformer market, while 220kv and below power transformers hold a dominating position. After State Grid included 110kv and below power transformers into its centralized bids, the bidding capacity of 220kv and below power transformers accounted for 81% of the total bidding capacity in the first four centralized bids invited by State Grid in 2011, while the bidding capacity of 500kv and 750kv power transformers only accounted for less than 17% in total.

In China, the concentration degree of the 220kv and above power transformer market is high, only with more than 30 manufacturers. In this market, TBEA, China XD Electric, Tianwei Baobian, Siemens and ABB play main roles, and have apparent competitive advantages in the bids invited by State Grid for high, super-high and ultra-high voltage transformers.

In the field of 110kv and below power transformers, there are more than 1,000 manufacturers. In addition to a few large enterprises including China XD Electric,

Tebian Technology, Shandong Dachi, and Sanbian Sci-Tech that have nationwide bid winning and selling capabilities, the competitiveness of the majority of enterprises is weak and they have to depend on local power companies in marketing. The market competition is featured with obvious regional characteristics.

TBEA - it is China's largest transformer manufacturer, and it can produce 1,000kv and below power transformers. In the first four centralized bids for power transformers organized by State Grid in 2011, it had evident competitive advantages in the field of 220kv and above power transformers. It is the biggest beneficiary in China's super-high and ultra-high voltage power grid construction.

China XD Electric - it belongs to XD Group, and it is China's largest high, super-high and ultra-high voltage power transmission & distribution equipment manufacturer, with a superior industry chain. It is the second largest power transformer manufacturer in China. Its main products are 110 kv and above transformers, high voltage switches and other power transmission & distribution equipment.

Tianwei Baobian - it has the most complete transformer core technologies in China. It is a major equipment supplier of 1000MW and below generators and 750kv and below substations in China, and it is also the only supplier of main transformers for nuclear power plants in China.

Sanbian Sci-Tech - it is a key manufacturer of 220kv and below transformers in China, with the annual capacity of 28 million KVA. It has competitive advantages in medium & low-voltage transformer market.

Zhixin Electric - it is a professional manufacturer of amorphous alloy transformers in China, with over 80% market shares. It is supported by government policies. Currently, it has the capacity to produce amorphous alloy strips. The raw materials problems which restrict the growth of amorphous alloy transformer capacity are expected to be resolved, so the company has a good prospect.

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