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Research Report on China's New Energy Industry, 2011-2012

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Abstracts

In 2010, China's clean energy investment grew by 30% to USD 51.10 billion.

In the next few years, China's new energy industry will still be in the period of rapid development. However, in the context that resources, cost, consumption, peak regulation and other key factors play different roles, the development process of wind power, photovoltaic and nuclear power industries in China is inevitably unbalanced.

China is rich in wind resources, and the potential development capacity of wind power onshore and offshore is respectively 2.38 billion kilowatts and 200 million kilowatts. It is predicted that in 2020, the planned installed capacity of wind power in China will be 150 million kilowatts (including 30 million kilowatts of offshore wind power). Rise in concentration of wind power equipment suppliers, acceleration of offshore wind power development, and large-scale single units become the three major trends of the future wind power industry.

In the situation that European countries cut down photovoltaic subsidies successively and in 2011, the installed capacity growth of global photovoltaic slows down, China's photovoltaic industry is likely to experience excess production capacity. It is predicted that it will be difficult for China's photovoltaic application market to develop rapidly in the short run, and development of China's photovoltaic industry will still rely on overseas market.

In order to achieve the objective that the proportion of non-fossil energy consumption in primary energy consumption must reach 15% in 2020, the installed capacity of hydropower should reach at least 320 million kilowatts in 2020, increasing by 120 million kilowatts over 2010. Since it takes a large power station at least 5-8 years from

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construction to production, about 120 million kilowatts will be operated in 2010-2015. Owning to rich resources, brisk market demand and policy encouragement, small hydropower stations will receive attention as a new round of investment hotspot in Chinese market. Seen from the investment propensity in recent years, small hydropower stations are becoming a new economic hotspot following real estate, automobile and IT industries.

In the next few years, China will enter the peak period of nuclear power construction, the project of 30 million kilowatts of nuclear power under construction will promote the substantial growth of demand for nuclear power equipment, and the industry's prosperity peak will come as scheduled. Due to the definite policies for the nuclear power industry, the Chinese government gives huge capital support for the nuclear power industry. Meanwhile, the majority of nuclear power projects under construction in China have been well completed and will be put into production successively in the next few years. Therefore, the scale of the nuclear power industry will continue expanding in the next few years. It is predicted that by 2020, the installed capacity of nuclear power in China will have reached 80 million-90 million kilowatts. Calculated by 60%, the proportion of related equipment investment in the total investment, in the next decade, the annual average market demand for nuclear power equipment will be over CNY 55 billion.

The depletion of traditional energy and the problem of environmental pollution are increasingly serious. In order to change the way of modern economic development and free economy from the dependence on traditional energy, various countries take the issue of new energy development as an important development strategy issue. The U.S.A., Japan, EU, etc. are all actively developing new energy and have made some achievements. China's new energy industry started relatively late and is still in its initial stage at present. In the prior development stage of the new energy industry, substantial capital and policy support are required. Therefore, in recent years, the Chinese government has issued a series of policies and measures to protect and support development of the new energy industry. However, as a new capital-intensive industry with high technology content, the new energy industry is confronted with many uncertainties and risks in the process of development. These risks mainly include such four aspects as policy risks, environmental risks, industry chain risks and market risks, among which policy risks, macroeconomic environment risks and industry chain risks will have the greatest impact, followed by exchange rate risks, supply and demand risks, etc. Trade policy risks, environmental protection policy risks and competition risks will have the minimal impact.

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On the whole, China's new energy industry faces greater opportunities than risks at present.

Following more information can be acquired from this report:

Development Status of China's New Energy Industry

Policies for New Energy Industry Issued by the Chinese Government

Status Quo of Sub-industries of New Energy Industry

Development Environment Confronting New Energy Industry

Prediction on Development of New Energy Industry

Prediction on Investment Opportunities for New Energy Industry

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