

Assessment of China's Market for Smart Meters

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Abstracts

BEIJING- April 11, 2011 – GCiS China Strategic Research has published a study of the China market for electric smart meters. The study, which focuses on single phase and three types of three phase meter, estimates the value of China's domestic market at over RMB 10 Bn for 2010 and experienced growth rates in excess of 25% last year.

Growth is driven by the State Grid's smart meter purchase program and the nation's Twelfth Five Year Plan that will see between 80 million smart meters installed in Chinese homes by 2015 and the adoption of smart metering across commerce and industry. When replacement purchases are factored in, the total installed base could well exceed a quarter of a billion units by 2020.

Amid such staggering growth rates, smart meter suppliers have been racing to expand their factory capacities. "The average smart meter supplier in China is at two-thirds capacity, which would have alarm bells ringing any other market," said Edward Barlow, senior analyst and author of the study. "But in China they're looking at real growth of 17 to 20 percent per year for the next five years." The study, which surveyed around 75 key players, finds that total capacity is expected to increase by 30 percent by 2012.

However, the State Grid, which is looking for RMB 60 billion in short term loans, has reportedly compressed smart meter pricing to a much lower extent than many suppliers can accommodate. As suppliers rush to the bottom of the cost curve, meter accuracy and lifespan are being forfeited. "The Grid companies account for two out of every three Renminbi spent in the market and they have been asking their suppliers for lower and lower costs per meter," Barlow added. "This is putting enormous pressure on the market."

About the GCIS China Smart Meters Market Study

This GCiS market study draws on a three month, in-depth primary survey of around 75 of the market's supply side, channel players and end-users. It is essential reading for any professional needing accurate and detailed strategic information on this market. Major areas covered include: market size and shares, five-year projections, market structure, pricing trends, distribution, consumption, an assessment of key suppliers and more.

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