

China Smart Grid Equipment Industry Report, 2012-2013

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Abstracts

According to the investment program of the 12th Five –Year Plan for Grid Intelligence Construction of State Grid Corporation of China (SGCC), segments of communication information, electricity consumption and substation hold the largest portions of investments, being 28.3%, 27.3% and 23.6%, respectively. Among the smart grid equipment bid invitation, smart meter and smart substation take the dominant position.

In point of smart meter market, in 2012, the volume of smart meter bid invitation occupied 97.18% of the total meter bidding amount, a jump from 89.01% in 2011. The annual smart meter bid invitation volume reached 76,043,000 sets, among which, 2S single-phase smart meter took the lead, grabbing 92.1% of the total. Presently, smart meter bid invitation market of SGCC features a rather lower concentration ratio. Take 2S single-phase smart meter market as an example, market shares of the top three companies, Wasion Group, Linyang Electronics and Ningbo Sanxing, are all less than 6%.

Seen from the field of smart substation equipment, 2012 saw great bid invitation growth of smart substation of SGCC, over 1,000 in the year around, and far higher than 283 in 2011. And bidding proportion of smart substation equipment further rose. Among the power transmission & transformation secondary equipment bidding success of SGCC, intelligence rate of protection equipment bidding invitation reached 74.35%, and that of monitoring equipment 69.39%.

In addition to the market size, major enterprises and prospects of the two market segments, smart meter and smart substation equipment, China Smart Grid Equipment Industry Report, 2012-2013 also highlights main market segments such as energy storage product, smart grid scheduling, flexible transmission and electric vehicle

charging station as well as related major companies.

In 2012, Linyang Electronics ranked top three among all the bidding invitations of the four batches of 2S single-phase meter of SGCC. At present, the company is capable of producing 80,000 single-phase meters and 10,000 three-phase meters daily. It boasts significant advantage of scale and strong cost control.

In 2012, Guodian Nanjing Automation (600268) harvested revenue of RMB4.147 billion, an increase of 29.43% YOY, and made net income of RMB308 million, a growth of 20.65% from a year earlier. General contracts of power transmission and transformation increased sharply in 2012, from which the revenue reached RMB131 million, soaring by 106.75% yr-on-yr.

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