

China High Voltage Switchgear Industry Report, 2009-2010

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Abstracts

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High voltage switchgears are a type of primary equipment in power transmission and distribution, functioning as a protective mastery of power transmission and distribution and taking around 6% of total grid investment in China. The rated voltage of high voltage switchgears is usually divided into high voltage (126-252kV), super high voltage (363-800kV), and ultra high voltage (1100kV). High-voltage switchgear mainly includes CB, GIS, H-GIS, DS, ES and load switches.

With the growing investment in power grid and the rapid progression of UHV projects in China in recent years, the high-voltage switchgear industry has been developing speedily at the compound growth rate of 24% since 2003. Both output value and sales revenue of the industry as of 2008 exceeded RMB100 billion; and the figures in 2009 rose by 25% and 21% respectively over 2008.

The report not only highlights the outstanding switchgears including CB, GIS, H-GIS, DS and ES when the high-voltage demand surges, but also analyzes the supply and demand in the market as well as the enterprises by voltage class.

1 CB

In recent years, high-voltage circuit breakers, especially SF6 high-voltage circuit breaker with high technical content and high added value, have been developing rapidly with a CAGR of 13.9% during recent 8 years. At the same time, medium-voltage

vacuum circuit breakers begin to turn to high-voltage ones. With the coming 'UHV' era of power grid, Chinese market of high-voltage vacuum circuit breakers has a bright prospect in the future.

As a whole, Chinese circuit breaker market is dominated by foreign-funded enterprises, while China XD and Pinggao Electric are the most influential companies among domestic enterprises. By voltage class, foreign-funded enterprises focused on 220KV-and-below circuit breakers in 2009; while domestic peers had strength in high-voltage and super high-voltage circuit breakers. In 2009, Pinggao Electric was the biggest winner of the bid invited by State Grid for 750KV circuit breakers, with the shares of 38%; China XD won the bid for 59 sets of 500KV circuit breakers, with a market share of 24%.

2 GIS

As it covers little area and runs with high reliability and hardly affected by the environment, GIS has been welcomed in the market in recent years, particularly 252KV and 550KV-and-above GIS.

In recent years, the demand of a diversity of customers for 126kV GIS keeps growing in China, and the market is expanded fast. Yet, the numerous manufacturers bring fierce market competition. Comparatively, 252 KV GIS outperformed the GIS sector, with a CAGR of 50.9% during recent eight years. The increased demand for high-voltage switchgears makes 550KV (nominal grid voltage 500KV) become the mainstream in the market. In 2009, the bidding volume for 500KV GIS invited by State Grid recorded 89 partitions, 1.28 times larger than that of last year. Additionally, 800KV GIS has been put into operation massively in power grids across China, and 1100KV GIS has also been successfully developed, particularly represented by the producer China XD.

3 H-GIS

In H-GIS, 550KV (rated grid voltage 500KV) H-GIS is applied most widely and it sees a rising proportion in the total bids invited by State Grid from 2007 to 2009, from 65% in 2007, 100% in 2008 to 86% in 2009.

As for the winners of bids, China XD brought its advantages into full play in the 550KV H-GIS market in 2009, accounting for 40% by the bid-winning partitions and up 26 percentage points from 14% in 2008. New Northeast Electric ranked second, and its market share grew at the fastest rate, from 4% in 2008 to 35% in 2009.

4 DS & ES

In China DS and ES industry, there is a large number of enterprises adept in 126KV-below DS and ES, so the competition in the market is fierce and the supply is sufficient; only a few enterprises focus on 126KV-above DS and ES, with monopolistic advantages. Currently, 252-550kV DS market is under control of several enterprises with great strength in R&D. What's more, 800kV, 1100kV super and ultra high-voltage DS has stricter technical requirements, but most companies lack capacity. As a result, the supply falls short of the demand, and the enterprises, as usual, mostly do the R&D and production simultaneously to timely satisfy market demand.

Among the bids invited by State Grid and China Southern Power Grid in 2009, 22.53% of DS and ES (1,938 sets) was won by Changgao High Voltage Switchgear, which took the first place; Rugao High Voltage Electric and Pinggao Electric held the shares of 18.61% and 12.9% respectively.

In addition, the report also focuses on over 20 key enterprises, including ABB, Siemens, AREVA T&D China, China XD, Pinggao Electric, Changgao High Voltage Switchgear, Rugao High Voltage Electric, Taikai, New Northeast Electric and Daqo Group. Apart from the overall operation of those companies, it analyzes their production and marketing of key products, competitiveness, proposed projects and the ones under construction as well as future strategies.

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