

China Smart Grid Equipment Segmented Market Report, 2010-2011

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Abstracts

According to the plan of State Grid Corporation of China (SGCC), 2011-2015 will be dedicated to all-round promotion of smart grid construction. But in fact, 2011 only saw expansion of pilot implementation, and the actual investment was about RMB 30 billion, which was less than the RMB 51.8 billion scheduled. It's expected that 2012 will see the fastest growth in the smart grid investment during the "12th Five-Year Plan" period (2011-2015), and hence accelerated growth in related smart grid equipment market.

Among all the smart grid equipment market segments in China, smart meter has the largest market scale, which is expected to be about RMB 8.25 billion in 2012. In 2011, 65 enterprises won the smart meter bidding of SGCC, and in 2010 there were 76. According to the bidding volume won in 2011, the market share was dispersed, and there were only four enterprises each occupying more than 5%, indicating a rather low market concentration ratio.

The bidding volume of smart substation saw significantly accelerated growth in 2011. In the six power transmission and substation equipment biddings in 2011, the bidding volume of smart substation increased successively. Up to the sixth bidding, 162 of the 582 substations for centralized bidding were smart ones, accounting for 28%. 75 smart substations were built up in 2011, and more than 300 smart substations are expected to be built up in 2012.

In the field of smart scheduling, NARI Technology Development and China Electric Power Research Institute (EPRI) occupy the major market share in integrated regulation and control, smart grid scheduling technology support system and large-scale centralized control station. During the "12th Five-Year Plan" period, China's smart scheduling market capacity is expected to be about RMB 2 billion annually.

The Report mainly covers the following contents:

Development of smart grid and smart grid equipment in China;

Current status and prospect of smart meter, energy storage battery, digital substation, flexible power transmission, electric vehicle charging equipment and smart scheduling markets;

Development of smart meter market in China, bidding, risks and trends in smart meter market segments;

Operation, bid winning and prospect of 14 smart grid equipment companies.

In addition, according to the smart grid construction progress and the scale of investment in various fields, the key direction of the next phase will be smart substation and smart meter, and the construction of smart substation will be the most important. During the "12th Five-Year Plan" period, the total investment of SGCC in smart grid will be RMB 286.11 billion, with annual investment of RMB 57.22 billion on average.

Contents

Preface

1. DEVELOPMENT OF SMART GRID EQUIPMENT IN CHINA

1.1 Smart Grid

1.2 China's Smart Grid Construction has Entered Comprehensive Construction Stage

1.3 Smart Grid Equipment Benefits from Smart Grid Construction

2. CHINA'S SMART METER MARKET

2.1 Smart Meter

2.2 Policy

2.3 Smart Meter Bidding Requirements of SGCC

2.4 Smart Meter Market

2.5 Smart Meter Market Segments

2.5.1 2S Single-phase Smart Meter

2.5.2 1S Three-phase Smart Meter

2.5.3 0.5S Three-phase Smart Meter

2.5.4 0.2S Three-phase Smart Meter

2.6 Risks and Trends

2.7 Key Companies

2.7.1 Shenzhen Clou Electronics Co., Ltd.

2.7.2 Wasion Group Holdings Limited

2.7.3 Shenzhen Haoningda Meters Co., Ltd.

2.7.4 Shenzhen Kaifa Technology Co., Ltd.

3. CHINA'S ENERGY STORAGE BATTERY MARKET

3.1 Development of Energy Storage Battery in China

3.2 Prospect of Energy Storage Battery Market

3.3 Key Companies

3.3.1 Narada Power Source Co., Ltd.

3.3.2 EVE Energy Co., Ltd.

4. CHINA'S DIGITAL SUBSTATION MARKET

4.1 Development of Digital Substation in China

- 4.1.1 Definition
- 4.1.2 Development
- 4.2 Key Companies
 - 4.2.1 Guodian Nanjing Automation Co., Ltd.
 - 4.2.2 XJ Electric
 - 4.2.3 NARI-Relays Electric Co., Ltd.

5. CHINA'S FLEXIBLE POWER TRANSMISSION MARKET

- 5.1 Flexible Power Transmission
- 5.2 SVC Application in China
- 5.3 Prospect of Flexible Power Transmission Market
- 5.4 Key Companies
 - 5.4.1 RXPE
 - 5.4.2 Sieyuan Electric

6. CHINA'S ELECTRIC VEHICLE CHARGING EQUIPMENT MARKET

- 6.1 China's Electric Vehicle Charging Station Market
 - 6.1.1 Construction
 - 6.1.2 Prospect
- 6.2 Key Company – Shenzhen Auto Electric Power Plant Co., Ltd. (ATC)

7. CHINA'S SMART SCHEDULING MARKET

- 7.1 Grid Scheduling
- 7.2 Grid Scheduling Automation in China
- 7.3 Prospect of China's Smart Scheduling Market
- 7.4 Key Companies
 - 7.4.1 NARI-TECH
 - 7.4.2 Dongfang Electronics (DFE)

8. SUMMARY

Selected Charts

SELECTED CHARTS

China's Smart Grid Construction Plan

China's Key Smart Grid Construction Projects, 2009-2011

Smart Grid Investment Plan of SGCC, 2011-2015

Primary Equipment and Secondary Equipment Investment of SGCC, 2012-2020E

Ranking of Key Secondary Equipment by Market Size

Single-phase Smart Meter and Three-phase Smart Meter

Smart Meter Policies in China, 2003-2012

New Bidding Rules of SGCC, 2011

Bid Appraisal Scoring Structure of SGCC, 2011

Main Purchasers of Smart Meter

SGCC Smart Meter Bid Winning Results by Batch, 2010-2011

SGCC Smart Meter Bid Winning Results by Product, 2010-2011

SGCC Smart Meter Bid Winning Results by Winner, 2010-2011

SGCC 2S Single-phase Smart Meter Bid Winning Results by Batch, 2010-2011

SGCC 2S Single-phase Smart Meter Bid Winning Results by Winner, 2010-2011

SGCC 1S Three-phase Smart Meter Bid Winning Results by Batch, 2010-2011

SGCC 1S Three-phase Smart Meter Bid Winning Results by Winner, 2010-2011

SGCC 0.5S Three-phase Smart Meter Bid Winning Results by Batch, 2010-2011

SGCC 0.5S Three-phase Smart Meter Bid Winning Results by Winner, 2010-2011

SGCC 0.2S Three-phase Smart Meter Bid Winning Results by Batch, 2010-2011

SGCC 0.2S Three-phase Smart Meter Bid Winning Results by Winner, 2010-2011

Industry Concentration of SGCC Smart Meter Bid Winning Enterprises, 2010-2011

Capacity Expansion of Major A Share Listed Smart Meter Companies

Main Products of Shenzhen Clou Electronics

Operating Revenue and Total Profit of Shenzhen Clou Electronics, 2008-2011

Operating Revenue of Shenzhen Clou Electronics by Industry, 2008-2011

Operating Revenue of Electronic Instrument and Meter Business of Shenzhen Clou Electronics by Product, 2008-2011

Gross Margin of Electronic Instrument and Meter Business of Shenzhen Clou Electronics by Product, 2008-2011

SGCC Smart Meter Bidding Won by Shenzhen Clou Electronics, 2010-2011

Volume of SGCC Smart Meter Bidding Won by Shenzhen Clou Electronics by Type of Smart Meter and Batch of Bidding, 2010-2011

Share of SGCC Smart Meter Bidding Won by Shenzhen Clou Electronics by Type of Smart Meter and Batch of Bidding, 2010-2011

Turnover and Gross Profit of Wasion Group, 2008-2011
Turnover of Wasion Group by Product, 2008-2011
SGCC Smart Meter Bidding Won by Wasion Group, 2010-2011
Volume of SGCC Smart Meter Bidding Won by Wasion Group by Type of Smart Meter and Batch of Bidding, 2010-2011
Share of SGCC Smart Meter Bidding Won by Wasion Group by Type of Smart Meter and Batch of Bidding, 2010-2011
Operating Revenue and Total Profit of Shenzhen Haoningda Meters, 2008-2011
Operating Revenue of Shenzhen Haoningda Meters by Product, 2009-2011
Gross Margin of Shenzhen Haoningda Meters by Product, 2009-2011
Operating Revenue of Shenzhen Haoningda Meters by Region, 2009-2011
SGCC Smart Meter Bidding Won by Shenzhen Haoningda Meters, 2010-2011
Volume of SGCC Smart Meter Bidding Won by Shenzhen Haoningda Meters by Type of Smart Meter and Batch of Bidding, 2010-2011
Share of SGCC Smart Meter Bidding Won by Shenzhen Haoningda Meters by Type of Smart Meter and Batch of Bidding, 2010-2011
Operating Revenue and Total Profit of Shenzhen Kaifa Technology, 2008-2011
Operating Revenue of Shenzhen Kaifa Technology by Product, 2009-2011
Operating Revenue of Electricity Meter of Shenzhen Kaifa Technology, 2009-2011
SGCC Smart Meter Bidding Won by Shenzhen Kaifa Technology, 2010-2011
Volume of SGCC Smart Meter Bidding Won by Shenzhen Kaifa Technology by Type of Smart Meter and Batch of Bidding, 2010-2011
Share of SGCC Smart Meter Bidding Won by Shenzhen Kaifa Technology by Type of Smart Meter and Batch of Bidding, 2010-2011
Operating Revenue and Total Profit of Narada Power Source, 2008-2011
Operating Revenue of Narada Power Source by Region, 2008-2011
Operating Revenue of Narada Power Source by Product, 2010-2011
Production and Sales of Narada Power Source by Product, 2011-2013E
Operating Revenue and Total Profit of EVE Energy, 2008-2011
Operating Revenue of EVE Energy by Product, 2008-2011
Operating Revenue of EVE Energy by Region, 2010-2011
Traditional Substation Automation Market Share, 2011
Smart Substation in SGCC Protective Equipment Bidding, 2011
List of Substations in SGCC Equipment Integration Bidding, 2011
Operating Revenue and Total Profit of Guodian Nanjing Automation, 2008-2011
Operating Revenue of Guodian Nanjing Automation by Product, 2008-2011
Operating Revenue of Guodian Nanjing Automation by Region, 2008-2011
Operating Revenue and Total Profit of XJ Electric, 2008-2011
Operating Revenue of XJ Electric by Product, 2008-2011

Operating Revenue of XJ Electric by Region, 2008-2011
Key Digital Substation Project of NARI-Relays Electric
China's Industrial SVC Market Capacity, 2007-2012E
Operating Revenue and Total Profit of RXPE, 2008-2011
Operating Revenue of RXPE by Product, 2008-2011
Operating Revenue of RXPE by Region, 2008-2011
Operating Revenue and Total Profit of Sieyuan Electric, 2008-2011
Operating Revenue of Sieyuan Electric by Product, 2008-2011
Operating Revenue of Sieyuan Electric by Region, 2008-2011
Public Transportation and Public Charging Equipment Investment Structure in China, 2011
Operating Revenue and Total Profit of ATC, 2008-2011
Operating Revenue of ATC by Product, 2008-2011
Operating Revenue of ATC by Region, 2008-2011
Market Shares of China's Top Four DC Operation Power Supply Equipment Companies, 2011
Smart Scheduling Market Capacity in China during the 12th Five-Year Plan Period (2011-2015)
Operating Revenue and Total Profit of NARI-TECH, 2008-2011
Operating Revenue of NARI-TECH by Product, 2009-2011
Operating Revenue of NARI-TECH by Region, 2009-2011
Operating Revenue and Total Profit of DFE, 2008-2011
Operating Revenue of DFE by Product, 2008-2011
Operating Revenue of DFE by Region, 2008-2011
Operating Indicators of Main Smart Grid Equipment Companies in China, 2010-2011

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