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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.

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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.

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