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Chinese Power Industry Report, 2011H1

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Abstracts

In 2011 H1, the power generation capacity and the power consumption in China both maintained rapid growth; influenced by many factors such as rapid growth in demand, deficient water inflow, tight electricity and coal and thermal power loss, East China, Central China and other regions suffered insufficient power supply.

In January-June 2011, China's power generation capacity was 2,216.60 billion kilowatt-hours, increasing by 13.50% YOY, in which the generating capacity of hydropower was 274.20 billion kilowatt-hours, rising by 12.50% YOY; that of thermal power was 1,843.30 billion kilowatt-hours, increasing by 12.50% YOY; that of nuclear power was 41.40 billion kilowatt-hours, ascending by 24.20% YOY.

By the end of June 2011, the capacity of power generation equipment with 6,000 KW and above in China had totaled 961.66 million kilowatts, increasing by 10.50% YOY.

In the first 5 months of 2011, China's average precipitations were all lower than those in the same months of 2010. In June 2011, the major river basins in Central China and East China saw significantly improved water inflow, and the national average precipitation was higher than that in June 2010; influenced by precipitation distribution, in 2011 H1, the major hydropower plants had slightly less water inflow than the average of many years. However, due to the influence of factors such as excessive increase in installed capacity, China's hydropower generation capacity in 2011 H1 increased by 12.50% YOY.

In 2011 H1, the social power consumption in China ascended by 12.20% YOY.

Seen by regions, power consumption in Central and West China was more rapid than that in East China. In 2011 H1, power consumption in East China, Central China and West China respectively ascended by 11% YOY, 11.30% YOY and 15.80% YOY,

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respectively 5.90% YOY, 2.60% YOY and 3.80% YOY higher than the year-on-year growth rates in 2010 H1.

In January-June 2011, more than 20 regions in China adopted the power limit measures, among which Zhejiang, Guangdong and Guizhou carried out power limit monthly while Jiangxi and Hunan carried out it yearly except for February. Seen from the gap, the largest gap in terms of China's power supply in January approached 30 million kilowatts, which was obviously improved from the end of January to March; in April and May, due to the deficient water inflow, thermal power enterprises operated poorly, leading to enlargement of the gap, while the largest power limit load in May reached 18 million kilowatts. In June, the grid areas of East China and Central China both experienced many rounds of large-scale precipitation, and the hydropower output increased significantly, leading to the obvious alleviation of tight power supply; however, influenced by the factors such as rise in power consumption of air-conditioners and tight supply of electricity and coal resulting from deficient water inflow and excessively high temperature, the grids in South China suffered prominent contradiction between power supply and demand, and Guangdong and Guizhou still continued power limit.

In 2011 H1, power consumption growth of building material, metallurgy, chemical and nonferrous metal, namely China's 4 major energy-consuming industries became divided. The power consumption growth rates of building material and metallurgy were as high as 19.80% YOY and 12.50% YOY respectively; those of chemical and nonferrous metal were as low as 7.50% YOY and 6.70% YOY respectively. The power consumption of the 4 major energy-consuming industries totaled 748.20 billion kilowatt-hours, increasing by 11.20% YOY, which were 1% lower than the national average, increasing the social power consumption by 3.80%.

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