

# Research Report on China's Power Generation Equipment Industry, 2013-2017

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## Abstracts

Supported by policies of the Chinese government, new energy and clean energy such as nuclear power, wind power and hydropower swiftly and violently develop in China, which drives the continuous increase in the output of generator sets. In 2011, the output of power generation equipment reached 147 million kilowatts nationwide.

In 2011, China continuously promoted the implementation of new energy and efficient & clean energy development strategies. It accelerated the construction of ultra-high voltage (UHV) backbone network, promotion of rural power grid transformation & upgrade project and development of smart power grid, which provided strong support for the demand growth in products related to power generation equipment. The output of most products in the industry increased. Among it, the cumulative output of hydroelectric generator sets was over 30% YOY.

Since 2011, the effects of China's power source structure adjustment are obvious, with the growth rate of thermal power installed capacity declining year by year. In 2011, the installed capacity of wind power increased by 39.4% YOY. The installed capacity proportion of non-fossil energy such as hydropower, nuclear power and wind power increased from 26.53% in 2010 to 27.50% in 2011. The adjustment to the power source structure directly influences the demand structure of power generation equipment.

It is predicted that in the next few years, the proportion of China's thermal power generation equipment in the total power generation equipment will further decline. As wind power, nuclear power and other new energy power generation industries rapidly develop and many new energy power generation equipment projects are constructed and put into production, the supply will maintain the rapid growth trend in the coming years. Meanwhile, with variations in the investment structure, the supply structure of the

industry will correspondingly change. In the supply of the whole industry, the proportion of thermal power generation equipment supply will further decline.

The total output of China's power generation equipment is expected to mildly grow in the next few years. However, the growth within the industry will present relatively large structural differences. The scale of hydropower construction is still relatively large, and the thermal power develops towards large-capacity and high-parameter directions. The construction of renewable energy such as nuclear power and wind power as well as power grid accelerates. Power generation equipment of wind power, nuclear power, new energy and other clean energy will achieve substantial growth, and hydropower equipment will maintain the steady development. The thermal power equipment industry will be still in depression. The output of thermal power equipment is likely to continuously decline.

With the gradual rebound of the world's economy, especially the obvious economic recovery momentum in emerging markets such as India and Russia, the demand for power generation equipment is expected to significantly increase, which will drive the export of China's power generation equipment to rise.

It is predicted that the market scale of China's power generation equipment industry will maintain an annual compound growth rate of over 10% in recent years. The increasingly growing market demand also greatly promotes the development of the power generation equipment. With the rise in market demand, the power generation equipment market will sustainably develop. The construction of smart power grid, UHV and new energy will be the main force driving the development of the power generation equipment industry. Before 2020, the total investment of China's smart power grid is expected to be over CNY 1 trillion, and that of the UHV is over CNY 400 billion. From 2011 to 2020, the total investment of China's new energy industry is expected to be more than CNY 5 trillion, which creates excellent development environment for China's power generation equipment industry; with the development of China's economy and acceleration of urbanization and industrialization, the market demand for power generation equipment gradually increases, which will provide a strong impetus for the development of China's power generation equipment industry.

More following information can be acquired through this report:

Development Status of China's Power Generation Equipment Industry

Factors Influencing Development of China's Power Generation Equipment

Industry

Operation of Key Enterprises in China's Power Generation Equipment Industry

Investment Opportunities of China's Power Generation Equipment Industry in Recent Years

Prediction on Development of China's Power Generation Equipment Industry

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