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Research Report of Chinese Electrical Power Equipment Industry, 2009

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Abstracts

By the end of 2008, the installed capacity of Chinese power-generating equipments reached to 792.53 million kilowatts, YOY up by 10.34%, in which the installed capacity of the hydropower was 171.52 million kilowatts, accounting for 21.64% of the total capacity, YOY up by 15.68%; the installed capacity of the thermal power was 601.32 million kilowatts, accounting for 75.87% of the total capacity, YOY up by 8.15%; the total installed capacity of the parallel wind power was 8.94 million kilowatts, YOY up by 111.48%. The national grid circuit lengths of the electricity transmission lines with 220 kilovolts or above were 364.8 thousand kilometers, YOY up by 11.1%. The capacity of the electricity transformation equipments with 220 kilovolts or above was 1.38714 billion kilovolt-amperes, YOY up by 17.80%.

In 2008, the total investment amounts in the infrastructure construction of Chinese electrical power industry were YOY increased by 1.52%. The investment amounts in the power sources were YOY down by 10.78% and YOY up by 17.69% in the grid investments.

Among the ten measures to expanding the domestic demands issued by Chinese government, three measures were involved the grid investments, including perfecting the rural grids, speeding up the urban grid reform and speeding up the reconstructions in the earthquake-stricken areas.

In 2009, the investments in the electric power will total 580 billion Yuan (84.7 billion USD). The new energy constructions, such as the nuclear power and wind power, will be accelerated obviously. In accordance with the plans, China will start to construction the nuclear power stations in Zhejiang Sanmen, Shandong Haiyang and Guangdong Taishan. The scale of the new approved projects is about 8.4 million kilowatts.

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Meanwhile, the wind power bases above ten million kilowatts will be constructed within ten years in Gansu, Inner Mongolia, Hebei and Jiangsu. Also, the constructions of the large coal power bases will be speed up.

In 2009, Chinese electrical power equipment industry is one of the steady growth industries under the circumstances of international financial crisis. Most of the local electrical equipment enterprises introduce the foreign advanced technologies. The major technical parameter and performance of the local products are the same or near to the foreign products, but the quality and operation reliability have gaps compared with the products of the developed countries. Meanwhile, the local enterprises have yet not been mastered some crucial production technologies.

More investments in Chinese grids will drive the steady growth of the electricity transformer industry. In 2009, the fixed asset investments of State Grid are 260 billion Yuan (38 billion USD) including 250 billion Yuan (36.5 billion USD) in the power grids. The fixed assets investments of China Southern Power Grid are 102.5 billion Yuan (15 billion USD), including 87.99 billion Yuan (12.8 billion USD) investments in the power grids. In 2009, China is planning to invest 338 billion Yuan (49.3 billion USD) in the power grids, 30% (total 14.8 billon USD) of which will be used to the equipment purchase. The electricity transformers, as the main equipments of electricity transmission and transformation, will face prosperous market demands.

Meanwhile, China also speeds up the plans and constructions of the wind farms and nuclear power plants above million kilowatts and starts the bidding works of the parallel solar power stations.

The wind power is one of the fastest growth new energy industries. By the end of 2008, the total installed wind power generation capacity in China was 12.15 million kilowatts. The new installed wind power generation capacity was 6.246 kilowatts. It is predicted that the total installed wind power generation capacity in 2009 will exceed 20 million kilowatts. From the aspect of the market shares of the wind power equipments in 2008, the market shares of Chinese funded enterprises were increased regardless of the new installed capacity or the accumulative installed capacity; the market shares of the foreign funded enterprises were cut down because the foreign funded enterprises began to withdraw from Chinese wind power industry.

The foreign funded enterprises began to withdraw from Chinese wind power industry from November 2008, taking British Petroleum wholly withdraw from Asian wind power market as the sign, who had ever cooperated with Goldwind Science and Technology

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Co., Ltd. subsequently, Harakosan withdrew the joint project from Xiantan Electric Manufacturing Co., Ltd. Nuodebake Germany - Dole withdrew 40% stock shares. RyleTechnologyLtd.UK passed the stock shares to Wuxi Ryle Wind Technology Ltd.

Although the foreign funds withdrew from Chinese wind power equipment industry partially because of the international financial crisis, what is more important, the tax policies in China had been changed in China and some preferential policies for the foreign funded enterprises were cancelled, making the expected investment return of the foreign funded enterprises be cut down and leading to the foreign funds withdraw from Chinese wind power equipment industry.

For the nuclear power, the Development and Reform Commission approved 6 nuclear power plants in 2008, which had been in the construction phase. Dongfang Electric Corporation and Shanghai Electric Group Co., Ltd all have strong yield capacity of the nuclear power equipments.

The intelligent grids are the technology development direction in the future. The intelligent grids enhance the grid operation reliability by mastering the operation situation promptly, discover, judge and get rid of the hazards in time. The intelligent grids also are also characterized as resolute, economical, compatible and integrated. At present, State Grid has been constructing the automotive collection systems of the power consumption statistics. In the future, the power grid companies will intensify the supervision over the distributed generation of the renewable energy resources and intelligent demands and perfect the functions of the intelligent grids gradually.
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The construction of the extra-high voltage power grids is still the important investment direction of Chinese grids. According to the related statistics, the total investments of State Grid in the extra-high voltage power grids are more than 83 billion Yuan (12.1 billion USD). However, the total investments of State Grid in the extra-high voltage power grids including 750KV were only 10.8 billion Yuan (1.54 billion USD) in 2008.

In 2008, the new installed hydropower capacity in China was 20.1 million kilowatts, the record high in recent years. Meanwhile, Chinese government slowed down its speed of the hydropower project approval. In 2006, the approval of the hydropower projects was increased with the total hydropower projects of 13, the total sales exceeding 19.51 million kilowatts. However, in 2007 and 2008, the approved projects were reduced obviously, especially million kilowatts installed capacity in 2008. The higher safety requirements for the hydropower projects after the earthquake in Sichuan were also one of the factors.

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It is estimated that the approved hydropower projects in recent years must be above 12 million kilowatts so as to attain the goals of the hydropower construction in 2020. It is no doubt that the unapproved projects in 2007 and 2008 need to be recovered later. According to the related statistics, the total installed hydropower capacity waiting to be approved exceeds 50 million kilowatts. After the cautious approval in 2007 and 2008, there will probably be a small high peak for the hydropower project approval. As far as the domestic large hydropower equipment manufacturers are concerned, there exists huge investment opportunities in Chinese hydropower equipment market in 2009 to 2010.

This report makes a concrete analysis on the present development situation of Chinese electrical power equipment industry as well as the related sub-sectors. The report also introduces the operations of the major manufacturers in Chinese electrical power equipment industry. The electrical power equipment enterprises and the investors from home and abroad can learn some lessons and discover the potential investment opportunities. This report is of high reference values to know about the present development situation, competition patterns, market direction and development trends of Chinese electrical power equipment industry and master the investment opportunities.

More following information can be obtained in this report:
- Present Development Situation of Chinese Electrical Power Equipment Industry
- Factors affecting the Development of Chinese Electrical Power Equipment Industry
- Influences of International Financial Crisis on Chinese Electrical Power Equipment Industry
- Operations of Chinese Major Electrical Power Equipment Enterprises
- Distributions of the Foreign Funded Enterprises in Chinese Electrical Power Equipment Market
- Investment Opportunities in Chinese Electrical Power Equipment Industry in Recent Years
- Prediction on the Development of Chinese Electrical Power Equipment Industry

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