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Research Report on China's Electric Equipment Industry, 2011-2012

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Abstracts

By the end of November 2010, the installed capacity of China's power generation equipment has reached 902.57 million kilowatts, increasing by 10.80% YOY, in which the installed capacity of the hydropower was 179.05 million kilowatts, increasing by 12.80% YOY, that of the thermal power was 686.13 million kilowatts, increasing by 8.60% YOY, that of the nuclear power was 10.82 million kilowatts, increasing by 19.20% YOY, and that of the wind power was 26.09 million kilowatts, increasing by 81.30% YOY.

In January-November 2010, the total investment in China's electric power source construction was CNY 307.70 billion, with CNY 67.80 billion in the hydropower, CNY 111.10 billion in the thermal power, CNY 54.10 billion in the nuclear power and CNY 73 billion in the wind power. In January-November 2010, the newly added production capacity of China's electric power source was 67.30 million kilowatts, with 13.44 million kilowatts for the hydropower, 45.11 million kilowatts for the thermal power, 1.73 million kilowatts for the nuclear power, and 6.93 million kilowatts for the wind power. The investment in the power grid infrastructure construction was CNY 259.40 billion, with 220 KV and above added in the power grid construction. The transformer capacity was 206.95 million kilovolts, and the line length was 33,629 km (29,479 km of AC lines and 4,150 km of DC lines).

In 2010-2011, China's electric power equipment industry is one of the industries with certain growth rate under the international financial crisis. Most of China's domestic electric power equipment enterprises are introducing foreign technology. The major technical parameters and properties of domestic products are basically the same or similar with foreign products, while the products' quality and operational reliability lag behind those in developed countries. Meanwhile, domestic enterprises have not

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grasped the manufacturing techniques of some key electric power equipment.

It is estimated that in 2011-2015, China's markets of hydropower, smart grid, and UHV grid will see favorable development prospects.

By 2020, China's hydropower production target will have reached about 430 million kilovolts. In 2011-2015, the operation target of China's hydropower will be about 83 million kilovolts, and that of pumped storage power stations will be about 80 million kilovolts. China's hydropower developing and equipment manufacturing enterprises will enjoy favorable development space.

Smart grid construction will be the main direction of grid development in the next few years in China. According to the plans of State Grid Corporation of China, the strong smart grid construction will be prompted in three stages, during which the total investment will be predicted to exceed CNY 4 trillion. The first stage will involve planning and pilot (2009-2010) with the estimated investment of CNY 550 billion; the second stage will involve comprehensive construction (2011-2015) with the estimated investment of CNY 2 trillion, in which the investment in UHV grid will be CNY 300 billion; the third stage will be leading and promotion (2016-2020) with the estimated investment of CNY 1.70 trillion, in which the investment in UHV grid will be CNY 250 billion. The preliminary establishment of smart grid will have been realized by 2020.

If China promotes smart grid in a wide range before 2015, backbone UHV grid will need to be constructed vigorously, and power grid automation market will be launched on this basis. By then, the secondary electric power equipment will be endowed with huge space, and the transmission grid automation control and integration scheduling system will be the market focus. State Grid Corporation of China announced on August 12, 2010 that the UHV grid in North China, East China and Central China would have been constructed by 2015, forming “three vertical lines, three horizontal lines, and one ring form”. On the same day, the State Grid announced that the UHV AC test demonstration project along Southeastern Shanxi – Nanyang -- Jingmen with 1,000 KV, the world's highest operating voltage, had been accepted by the Chinese government, indicating that China's UHV construction is about to enter the comprehensive construction stage, and the approval and construction process of follow-up projects will be expected to speed up.

China's energy is characterized by imbalance, with coal mainly in Shanxi, Inner Mongolia, etc. and hydropower mainly in southwestern provinces, while major electric power load centers in East China and coastal areas in North China respectively. In

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order to save energy loss in transmission lines, it's imperative to construct long-distance UHV transmission grid. The comprehensive implementation of China's UHV grid construction will bring broad market space for UHV equipment manufacturers.

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Operations of Key Enterprises in China's Electric Power Equipment Industry

Layout of Foreign-funded Enterprises in China's Electric Power Equipment Market

Prediction on Development of China's Smart Grid

Prediction on Development of China's UHV Grid

Investment Opportunities in China's Electric Power Equipment Industry in Recent Years

Prediction on Development of China's Electric Power Equipment Industry

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