

Research Report on Chinese Hydropower Industry 2011-2012

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Abstracts

By the end of 2010, Chinese installed capacity of hydropower had reached 213 million kilowatts, scale of newly-added approved hydropower stations had been 13.22 million kilowatts, and those stations under construction had owned the scale of 77 million kilowatts.

Chinese hydropower industry has a simple industry chain, i.e., the hydropower equipment manufacturing, the hydropower project building industry and acquisition of hydropower resource development right in the upstream, construction and operation of hydropower stations in the midstream, and the power grid industry in the downstream.

In China, hydropower is a renewable energy with mature technology, superior market competitiveness, which can be developed on a large scale. To develop hydropower is an important measure taken by the Chinese government to realize the goals of energy conservation, emission reduction and non-fossil energy development.

At present, many problems exist in hydropower development such as environmental protection, mainly because enterprises fail to deal with the relationship between hydropower development and local residents' interests as well as ecological protection. Currently, as for Chinese hydropower policies and construction management, there also exist problems of attaching importance to project construction while putting aside environmental treatment, and emphasizing economic interests while ignoring social benefits. However, as long as reasonable hydropower development is achieved, hydropower is still the promising renewable energy.

The Chinese government plans to reduce carbon dioxide emissions per unit GDP by 40%-45% over 2005 in 2020, and upgrade the proportion of non-fossil energy in primary

energy consumption to about 15%. In recent years, proportion of non-fossil energy and clean energy in Chinese energy structure is on the rise. Meanwhile, installed capacity of thermal power is on the decrease, and proportion of newly

added installed capacity of thermal power in the total of the whole year dropped from 81% in 2005 to 64% in 2010. As China encounters more pressure and responsibility of reducing carbon dioxide emissions, the role and effect of hydropower on carbon dioxide emission reduction and low carbon economy development will become increasingly apparent. To realize the goals of energy conservation and emission reduction in 2020, on that occasion, Chinese installed capacity of hydropower should reach 380 million kilowatts including 330 million kilowatts for conventional hydropower stations and 50 million kilowatts for pumped storage hydropower stations. From 2010 H2 to 2011 Q1, 10 large hydropower stations were approved in China with installed capacity of about 50 million kilowatts and total investment of over CNY 200 billion. Since the period for hydropower station construction is 5

10 years, it is predicted that Chinese hydropower industry will present a peak of investment before 2020, in which related industries will gain profits.

The nuclear accident of Japanese Fukushima Nuclear Power Plant in March 2011 made all countries pay more attention to the safety of nuclear power plants. The Chinese government also declared that the approval of nuclear power projects would be suspended before the nuclear safety planning is approved, which will transfer the investment from Chinese nuclear power industry to other energies. Hence, Chinese hydropower industry sees a promising prospect.

More following information can be acquired from this report:

Development of Chinese hydropower industry

Supply and Demand of Chinese hydropower industry

Investment prospect of Chinese hydropower industry

Major enterprises in Chinese hydropower industry and their operations-
Development prediction of Chinese hydropower industry

Following persons are recommended to buy this report:

Hydropower operators

Hydropower equipment manufacturers

Hydropower project builders

Investors and research institutions concerned about hydropower industry

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