China Utilities Industry Report - 2014

Description:
This report profiles China's utilities industry, discussing market trends through 2013 and outlook for 2014 and beyond. The report also highlights leading players in the sector including PetroChina Company Limited, China Petroleum & Chemical Corporation (Sinopec), Datang International Power Generation Company Limited, and China Power International Development Limited.

China's utilities industry has been experiencing rapid growth in recent years, although a deceleration occurred in 2009 due to the global economic downturn. China accounts for more than half of the region's power consumption, with growth averaging 7.6% per annum to 2030. The U.S. Energy Information Administration (EIA) projects China's installed electric generating capacity to grow by an annual average rate of 3.6% to reach 1,686 gigawatts (GW) by 2030.

China is expected to lead the way in adding hydroelectric and renewable electric generating capacity, such as solar and wind power. China boasted the world's largest wind power market by installed capacity in 2013 with a total of nearly 91 GW. Under the 12th Five-Year Plan (2011-2015), total installed capacity has the potential of reaching 130 GW. China also has 20 nuclear plants in operation with a combined capacity of 17 GW as of December 2013. By 2020, over 5% of total power capacity is expected come from nuclear, generating a capacity of 86 GW.

The country has the world's largest coal reserves and massive hydroelectric resources. Thermal power output accounted for the majority of total electricity production at 82.8% in 2013. Hydropower and nuclear power represented 15.0% and 2.1%, respectively, over the same period.

Key Points:
- China's electricity consumption totaled 5,322.3 billion kWh in 2013, a rise of 7.3% from 4,959.1 billion kWh. Meanwhile, total electricity production reached 5,042.7 billion kWh in 2013, an increase of 3.7% from 4,862.3 billion kWh in 2012.
- China has 20 nuclear plants in operation with a combined capacity of 17 GW as of December 2013.
- China's total installed wind power capacity was 75.48 GW by the end of 2013, up 24.5% yoy and is targeted to reach 150 GW in 2020.

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