Analysis and Forecast of China Smart Meter Market, 2013-2017

Description: At present, for the meters being used including the industry, commercial and household meters in the world, the users are numerous, with about 1.7 billion sets of meter. If all these meters are upgraded into the smart meter, the market scale is quite considerable. For 2012, the global shipments of smart meter reached 100 million sets rising by 31.6% compared with 2011; the market scale of global smart meter reached USD 7 billion in 2012.

In 2012, the total shipments of China’s meters were 110.6 million sets including 98.5 million sets of smart meter. As the smart meter market developed rapidly in 2010 and 2011, the manufacturers of energy meter sequentially expanded the production capacity; now in order to guarantee the utilization rate of production capacity, they accelerate to expand the overseas market one after another.

In 2013, the output of China’s meters is estimated to increase to 120 million sets and 91% of them will be smart meter. In the next few years, China’s smart meter market will continue to grow with the compound annual growth rate of 9.5%; with the acceleration of replacement speed, the output of ordinary meters will rapidly decline and it will nearly disappear by 2016.

Now the replacement of domestic meters is mainly led by the State Grid. According to the 2010 Planning of the State Grid, in order to meet the replacement demand of domestic meter, the State Grid will accomplish the installation bidding of 222 million sets of smart meter before 2014 and achieve the full coverage of users in the direct-supply and direct-management regions. But the actual bidding progress far exceeds the plan issued at the beginning of this year by the State Grid; at present, 192 million sets of meter accomplish the bidding including about 184 million sets of smart meter.

As the 12th-Five-Year Planning puts the smart grid as the key development direction, the State Grid will also comprehensively accelerate the development of strong smart grid. For smart meter, as the important part of the smart grid, the demand for them will rapidly expand; China will install 230 million sets of smart meter by 2015.

With the deepening of rural grid transformation, the basis for the rural region to implement the price ladder is forming following the urban region. The 250 million sets of smart meter bidding plan for the rural grid is expected to be launched in 2013H2; the bidding volume is equivalent to that of urban grid meter bidding from 2010 up to now. It is estimated the bidding will sustain about three years until 2016. According to the usual replacement cycle of meters, at that time the new round of urban grid meter replacement will begin.

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