China Smart Electric Meter Industry Report, 2016-2020

Description: Smart electric meter, an important basic device for acquiring smart grid data, undertakes the tasks of electricity data acquisition, metering and transmission, and plays a fundamental role in achieving information integration, analysis & optimization, and information expression. Rapid development of smart grid has driven up the demand for smart electric meters in China over recent years.

More than 90 million smart electric meters were installed in China in 2015, creating a market size of RMB18.2 billion, up 5.56% and 1.68% against the previous year, respectively. As more and more smart electric meters are installed, smart electric meters started entering a process of stock substitution in China in 2015. Besides new demands, replacement market will be one of main driving forces of market growth during 2016-2020 when smart electric meter installations will grow at an estimated average pace of 5.75% and the market scale 3.14%.

Smart electric meters are primarily promoted by State Grid and China Southern Power Grid via unified bidding with the former holding the lion's share. State Grid invites smart electric meter biddings for three to five times every year. The quantity of State Grid's biddings in 2014 and 2015 both exceeded 90 million units. The figure for the first batch in 2016 reached 69.12 million units and full-year amount is expected to rise significantly.

Smart electric meter industry is less concentrated in China. There are more than 100 producers whose products are mainly for residents and industrial & commercial users. Meanwhile, the equilibrium strategy adopted by State Grid restrains industry concentration to a large extent. In 2015, Ningbo Sanxing Electric and Jiangsu Linyang Energy were top2 winning bidders with 3.714 million and 3.709 million smart electric meters, both holding a market share of 4.08%, according to the biddings won by market players from State Grid.

Two problems faced by smart electric meters in China:

1. Poor core capacity for core parts like chips, leading to heavy reliance on foreign companies;
2. Not a unified communication mode. Despite collectors of the majority of producers conforming to unified standards of State Grid, there are differences in details, resulting in different dominant frequencies of communication and finally a failure in end-to-end transmission.

As China builds its smart grid, smart electric meter (a key basic part) will develop towards intelligent, multifunctional and modular one in the future. Upgrading of core technologies, improvement in communication modes and layout of major companies will be the focus of the industry.

China Smart Electric Meter Industry Report, 2016-2020 focuses on the followings:

- Global smart grid construction, smart electric meter promotion, and development planning in major countries;
- Smart grid in China (construction, investment, development planning);
- Smart electric meter in China (installations, shipments, market planning, imports & exports, and competitive landscape);
- Smart electric meter in China (communication protocols, promotion & application, and development trends);
- State Grid's smart electric meter bidding, major bid winners, development planning;
- Major smart electric meter producers in China (revenue, net income, gross margin, output/sales, bid winning, development planning)

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