China Smart Meter Industry Report, 2016-2020

Description:

In 2015, China's smart meter shipments reached 150 million units, up 6.8% yr-on-yr; expected to grow to 160 million units in 2016. In the future, with the continuous development of IoT (Internet of Things), the smart meter market will grow steadily at an average annual rate of over 8.0% in 2016-2020.

Smart meter consists mainly of smart electric meter, smart water meter, smart gas meter, etc. Among them, smart electric meter boasts the highest market penetration rate, approximately 95%; followed by smart gas meter with over 50%.

Smart Electric Meters are mainly promoted in the form of unified bidding by State Grid and China Southern Power Grid (began smart electric meter tender in 2016). In 2015, 90.99 million smart electric meter tenders were won from State Grid, single-phase smart electric meter and three-phase smart electric meter accounted for 88.9% and 11.1% respectively, of which, single-phase smart electric meter manufacturers had scattered tenders, while three-phase smart electric meter showed relatively high market concentration due to certain technical barriers. In 2015, Yantai Dongfang Wisdom Electric Co., Ltd. and Wasion Group registered the highest bid-winning rate in respectively fields of 0.5S three-phase smart electric meter and 0.2S three-phase smart electric meter, with respective market share of 17.5% and 69.7%.

Smart Gas Meter records shipments of 19.4 million units in 2015 and (an expected) 24.3 million units in 2016. As the market penetration grows, the figure may exceed 50 million units by 2020. At present, main suppliers in the market include Goldcard, Shaanxi Aerospace Power Hi-Tech Co., Ltd., HangzhouInnover Technology Co., Ltd., etc. In 2015, Goldcard took the first place with a 10.2% market share.

Smart Water Meter records shipments of 11.73 million units in 2015 (up 13.7% yr-on-yr) and (an expected) 13.49 million units in 2016. Currently, the market penetration of smart water meter is far below that of smart electric meter and smart gas meter, indicating a larger growth space. Key manufacturers are Sanchuan Wisdom Technology Co., Ltd., Suntront Tech Co., Ltd, Ningbo Water Meter Co., Ltd., etc. with annual capacity of more than one million units.

Primary driving factors in the future development of smart meter industry in China include IoT popularization, ladder price policies, etc.

IoT requires intelligent analysis of the collected data, thus smart meter is essential. And the application of NB-IoT technology in smart meter can solve the traditional meter wiring, high costs of wireless remote transmission equipment and other problems, but also make data accuracy rate as high as 99%. In 2017, with the release of NB-IoT series industry standards, NB-IoT will see large-scale application in the commercial sector, thus providing technical support for the development of smart meter.

So far, ladder pricing system has seen a wide range of implementation in water, electricity and gas fields, and traditional meters can't copy all data at the crucial point-in-time of calculating ladder price. Therefore, the popularizing rate of smart meter in water, electricity and gas fields will improve further.

The report highlights the following:

- Status quo, market size, market structure, and competitive landscape of China smart meter industry;
- Overview, policies, market size, market structure, competitive landscape, import & export, and State Grid tender of smart electric meter industry;
- Overview, development environment, market size, and competitive landscape of smart water meter industry;
- Overview, policies, market size, and competitive landscape of smart gas meter industry;
- Development history, development environment, market size, competitive landscape, and prospects of heat meter industry;
- Operation, smart meter business, etc. of 6 foreign and 16 domestic smart meter manufactures.

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