Electric Power Transmission & Distribution Equipment in China

Industry Study with Forecasts for 2013 & 2018

Study #2530 | August 2009 | $5200 | 259 pages
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Demand in China to rise 10% yearly through 2013

Demand for electric power transmission and distribution equipment in China is projected to advance at a 10.0 percent annual rate to ¥288 billion in 2013. Growth in electricity consumption will drive investment in electric power grid construction and capacity installation, in turn supporting related electric power transmission and distribution equipment sales. Expansion in construction activity (especially in the industrial sector) will both contribute to increases in such investment due to rising electricity consumption and provide new opportunities for direct product sales. Replacement and improvement of existing electric power transmission and distribution equipment will also boost increases.

Transformer products to see strongest growth

Sales of transformer products will see the strongest growth, with demand increasing 10.5 percent per annum through 2013. Gains will be supported by efforts to provide more stable and reliable electricity transmission and distribution. Demand for switchgear products will continue to account for the largest share of the total electric power transmission and distribution equipment market. Sales of meters are forecast to climb 9.4 percent annually, roughly in line with those of pole and transmission line hardware products.

Industrial market to register most rapid gains

Electric utilities will continue to represent the largest market for electric power transmission and distribution equipment, accounting for 52 percent of overall demand in 2013. Gains will be derived from expanding electric utilities investment in new electric generating capacity and power grid construction. The industrial market segment (including industrial cogenerators) will register the strongest gains through 2013. Growth will be fueled by increases in industrial construction and rising use of electrical and electronic equipment in industrial applications.

Northwest, Southwest regions to grow fastest

The Central-East is the largest regional market for electric power transmission and distribution equipment, accounting for 38 percent of total national demand in 2008. However, the Northwest and Southwest will register the fastest gains in electric power transmission and distribution equipment sales. Advances will be stimulated by increases in electric generating capacity, electric grid investment and construction expenditures, much of which is related to the government’s Great Western Development strategy. In addition, the ongoing West-East Electricity Transmission project will spur regional gains.

Strong gains in demand will be driven by growth in electricity consumption, expansion in industrial construction activity and the replacement and improvement of existing equipment.
Fuses & Fuse Equipment

Demand for fuses and fuse equipment is expected to rise 8.1 percent annually to ¥7.6 billion in 2013. New investment in both residential and nonresidential construction, electricity consumption will stimulate demand in applications where many fuses are used to protect machinery. Growth will be constrained by the increased use of circuit breakers in many fuse applications, due to advantages such as reusability, lower overall operating costs and compatibility with both advanced energy and underground wiring systems.

Fuses, including fuse boxes, holders and links, are used to provide protection from overvoltage in a circuit or electrical equipment. They incorporate a length of specially made wire or other element (known generically as the fuse link) that is designed to melt when an overcurrent passes through it and generates heat. This opens the circuit, thereby eliminating the overcurrent. These conventional fuses are nonresettable, but instead must be replaced once the link has burned out. However, there are also newer resettable fuses called positive temperature coefficient (PTC) fuses, which utilize a polymer with chains of a conductive element embedded in it. The heat from an overcurrent will change the polymer from a crystalline structure to an amorphous structure, thus expanding it slightly. This breaks the chain of conductive material in the fuse and eliminates the overcurrent. When the fault is cleared and the heat dissipates, the polymer returns to a crystalline structure and the fuse resets. In addition to being resettable, PTC fuses offer higher resistance than traditional fuses, but these devices are typically used in electronic applications, most of which fall outside the scope of this study.

Fuses are also referred to as current-limiting (which eliminate fault current before it reaches its peak), expulsion (whereby the fuse element is vaporized and the vapors expelled from the fuse tube) and by various other nomenclature. There is also a market for separately sold fuse parts.
Sample Profile, Table & Forecast

COMPANY PROFILES

DELIXI Group Company Limited
Delixi Industrial Park
Yueqing, Zhejiang 325604
China
86-577-6272-3888
http://www.delixi.com

Annual Sales: ¥19 billion [US$2.7 billion] (estimated)
Employment: 14,600 (estimated)
Key Products: circuit breakers, fuses and other electric power transmission and distribution products

International Contact: Mr. Yukuai Xia, Foreign Trade Representative

DELIXI Group is a privately held manufacturer of electric power transmission and distribution equipment. The Company has a plant in Zhejiang, China. DELIXI Group markets its products in more than 40 countries worldwide, in addition to selling products via a network of 1,500 distributors in China.

The Company participates in the Chinese electric power transmission and distribution equipment industry through the manufacture of such products as circuit breakers, fuses and other electric power transmission and distribution products. Among the circuit breakers produced by DELIXI Group are air, miniature, molded case and residual types. Representative circuit breakers from these four groups include CDW2 air circuit breakers for currents ranging from 630 to 4,000 amperes; CDB2 miniature circuit breakers, which feature high breaking capacity, rapid tripping capabilities and a compact design; CDM7 molded case circuit breakers for power distribution networks with alternating currents of 50/60 hertz, rated current of 800A, work voltage of 690 volts and rated insulated voltage of 690 volts.

TABLE IV-1

<table>
<thead>
<tr>
<th>Item</th>
<th>1998</th>
<th>2003</th>
<th>2008</th>
<th>2013</th>
<th>2018</th>
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<td>Construction Expenditures (bil ¥)</td>
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<tr>
<td>¥ elec &amp; d equip/000¥ construction</td>
<td>1006</td>
<td>2308</td>
<td>6114</td>
<td>10400</td>
<td>16400</td>
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<td>Total Electric T&amp;D Equip Demand</td>
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<td>Electric Utilities</td>
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<tr>
<td>Other</td>
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</tr>
</tbody>
</table>

CHART V-1

ELECTRIC POWER TRANSMISSION & DISTRIBUTION EQUIPMENT DEMAND IN CHINA BY REGION, 2008
(¥179 billion)
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**Other Studies**

**Batteries in China**

This study analyzes the Chinese battery industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by type (e.g., zinc-carbon/zinc-chloride, alkaline, primary lithium, lead-acid, rechargeable lithium, nickel-cadmium, nickel-metal hydride) and market (e.g., consumer, industrial, government, electric bicycles and motor vehicles, portable devices, motive power, backup power). The study also considers market environment factors, evaluates company market share and profiles industry participants. 

#2466 .......................... 09/2009 .......................... $5200

**World Electric Power Transmission & Distribution Equipment**

Global demand for electric power T&D equipment will rise 5.3% per year through 2013. The Asia/Pacific region will grow the fastest. Newer products used with wind and solar energy, and with the oil and gas, mining, and heavy manufacturing industries, will see strong growth. This study analyzes the $99.5 billion world electric power T&D equipment industry, with forecasts for 2013 and 2018 by market, product, world region and for 20 countries. It also evaluates market share and profiles industry players.

#2529 .......................... 07/2009 .......................... $5700

**Electric Transmission & Distribution Equipment**

US demand for electric T&D equipment will grow 2.6% yearly through 2013. Gains will be driven by upgrades to the US electric grid, more power generated by independent producers and cogenerators, and the installation of renewable energy systems such as wind. Switchgear and meters (e.g., smart meters) will be the fastest growing types. This study analyzes the $21 billion US electric T&D industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry competitors.

#2503 .......................... 06/2009 .......................... $4600

**World Fuel Cells**

Global commercial fuel cell demand will triple through 2013 in dollar terms. Portable fuel cell systems will remain the dominant application by unit, while electric power generation will continue as the top use in value terms. PEM chemistry fuel cells will strengthen their dominant position over the next decade. This study analyzes the $570 million world fuel cell industry, with forecasts for 2013 and 2018 by market, product, world region and for 15 national markets. It also details market share and profiles major players.

#2502 .......................... 05/2009 .......................... $5800

**World Diesel Engines**

Global diesel engine demand is forecast to rise 3.5% yearly through 2012. The Asia/Pacific region will remain the largest market while North America will be among the fastest growing based on increased heavy vehicle output and use of diesel engines in light vehicles. Stationary power will be the fastest growing end use segment. This study analyzes the $129 billion world diesel engine industry, with forecasts for 2012 and 2017 by market, world region and for 26 countries. It also details market share and profiles industry players.

#2470 .......................... 04/2009 .......................... $5700

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