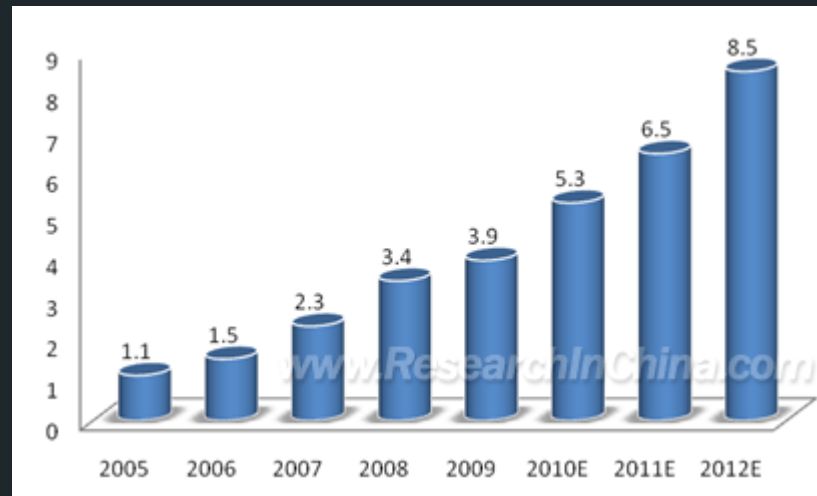


China High-voltage Inverter Industry Report, 2009-2010



Along with the rising of Chinese high-voltage inverter (In China, a motor with a rated voltage of 3-10kV is known as a high-voltage motor, so an inverter developed for the motor running in the 3-10kV environment is known as a high-voltage inverter, called as medium voltage inverter abroad) manufacturer and the sharp increase of downstream demand, China's high-voltage inverter market size has witnessed rapid expansion from RMB1.1 billion in 2005 to RMB3.9 billion in 2009, with a CAGR of 37%. In 2010, China continues to popularize energy-efficient motor products and provides support for energy-saving service companies, which will further fuel the high-voltage inverter market. It is estimated that the high-voltage inverter market scale will approximate RMB8.5 billion in 2012.

China High-voltage Inverter Market Size, 2005-2012E (Unit: RMB bn)



Source: ResearchInChina

Starting from the development environment of high-voltage inverter, this report casts light on not only the current development, market size, supply & demand, and price trend of high-voltage inverter industry, but 13 key enterprises (including major investment enterprises in China like Siemens, ABB, Rockwell Automation, and Toshiba Mitsubishi-Electric Industrial Systems Corporation (TMEIC)).

High-voltage inverter industry is featured by relatively high entry barriers, so, only those enterprises that possess such superiorities in technology, capital, and brand can find a place of their own in this industry. By virtue of powerful technologies and brands, Siemens and ABB have taken the lead in global high-voltage inverter market with the respective market share of 26.5% and 20.0% in 2009, far higher than that of the Chinese leading enterprise of high-voltage inverter -Beijing Leader & Harvest Electric Technologies Co., Ltd. (global market share: 6.5%).

The huge potential market of high-voltage inverter in China has accelerated the industrial integration and capital intervention during the recent years. In 2007, Guangzhou Zhiguang Electric Power Shares Holding Cooperation Ltd. went public; at the end of 2009, 94% equities of Beijing Leader & Harvest Electric Technologies Co., Ltd. were purchased by Affinity Equity Partners; in 2010, Harbin Jiuzhou Electrical Co., Ltd. (Jiuzhou Electric) and Hiconics Drive Technology Co., Ltd. (Hiconics) successively became the listed companies. Meanwhile, Guodian Nanjing Automation Co., Ltd., Wolong Electric, Shenzhen Clou Electronics Co., Ltd., Dongfang Electronics Co., Ltd., etc also tapped into the field of high-voltage inverter. Till H1 2010, there had been thirty high-voltage inverter enterprises in China with the import substitution rate of more than 60%.

Although the number of high-voltage inverter manufacturers keeps growing, the market shares are seized by a few enterprises, and the Top 10 companies have held over 80% market share. In particular, Beijing Leader & Harvest Electric Technologies Co., Ltd. has enjoyed the largest market size for consecutive seven years, and in Sep. 2010, the high-voltage inverter sales volume of the company rocketed to 4, 000 sets accumulatively.

Hiconics, with the annual capacity of 1, 200 high-voltage inverters, produced in 2009 China's first synchronous vector control high-voltage inverter, and in 2010 the domestic first 7700kW high-power high-voltage inverter which has been exported to India.

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