



China Inverter Air Conditioner Industry Outlook Report, 2010-2015

Mar. 2011

This report

- ◆ **Analyzes the development and policy environment of inverter air conditioner industry of China.**
- ◆ **Focuses on import & export of air conditioner in China.**
- ◆ **Highlights the operation and development of major enterprises in inverter air conditioner industry worldwide and China.**

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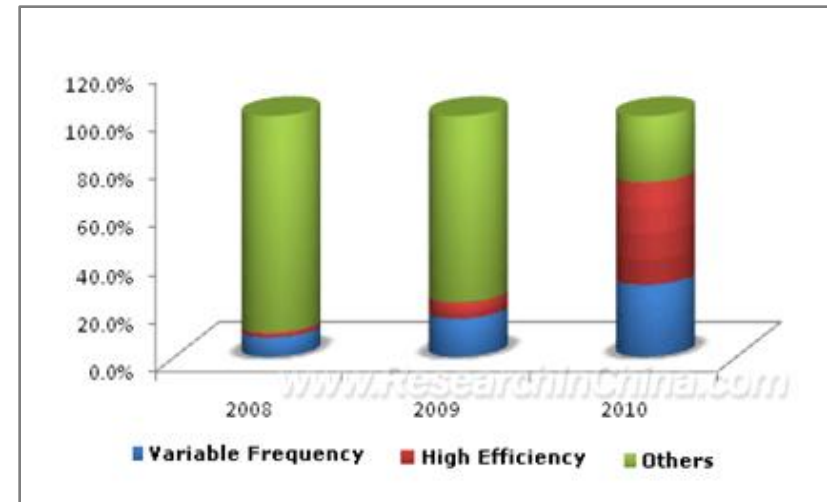
China Inverter Industry Outlook Report, 2010-2015

Abstract

In the second half of 2010, China adjusted the fiscal subsidy policy for high-efficiency air conditioner, which was a turning point for China's inverter air conditioner market to usher in a full-blown development stage. The slash of fiscal subsidy for high-efficiency fixed-frequency air conditioner shortened the price gap between high-efficiency fixed-frequency air conditioner and high-efficiency inverter air conditioner; as a result, inverter air conditioner products with better performance have seen a remarkable growth in the sales volume. In 2010, the domestic market occupancy of inverter air conditioner surged to 29.8% from 15.8% in 2009.

In terms of competition pattern in the inverter air conditioner market, Midea takes the leading position.

Retail Volume Structure of China's Air Conditioner Market, 2008-2010

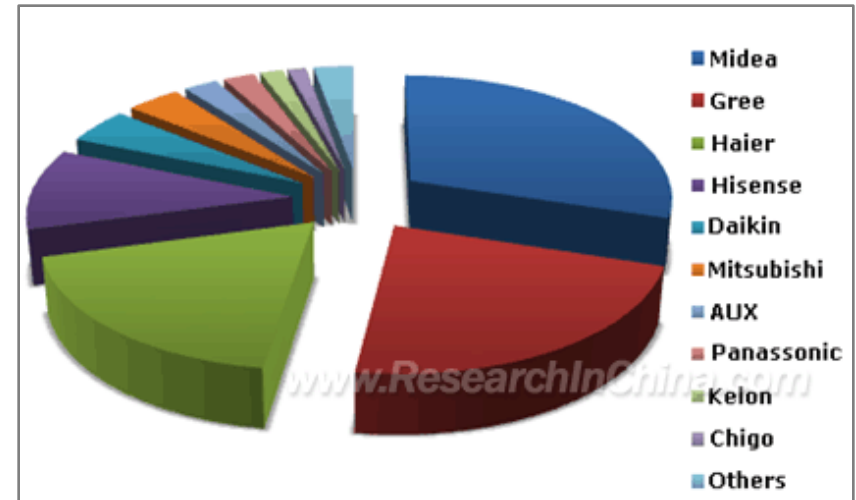


Source: ResearchInChina

In 2010, China's major air conditioner brands including Midea, Gree, Haier, Hisense, AUX, Kelon and Chigo took up 86.6% of China's inverter air conditioner market. Presently, domestic brands occupy a predominant position especially in the wall-mounted inverter air conditioner market, where the inverter air conditioner production lines of the above-mentioned manufacturers are concentrated, such as the 26-model, 32-model and 35-model of Midea and Gree, the 26-model, 28-model and 35-model of Haier, and the 26-model, 28-model and 35-model of Hisense.

Japanese air conditioner brands like Daikin and Panasonic, with core technology of inverter compressor, only have some advantages in China's high-power cabinet inverter air conditioner market. In 2010, Japanese inverter air conditioner products occupied more than 50% of the 2.5HP cabinet air conditioner market, and more than 20% in the 3HP and small 4HP cabinet air conditioner market.

Competition Structure of Inverter Air Conditioner Market in China, 2010



Source: ResearchInChina

In 2011, China further adjusted the energy efficiency standard for inverter air conditioner, which will raise the technology threshold to China's inverter air conditioner industry. The policy adjustment will encourage domestic air conditioner manufacturers to speed up the technology upgrading of inverter air conditioner products, thus eco-friendly and energy-saving inverter air conditioners like dual-mode fluorine-free inverter air conditioner are expected to become the mainstream in the air conditioner market in China.

1. Development of Air Conditioner Industry of China

1.1 Development

1.1.1 Production & sales

1.1.2 Competition Pattern

1.2 Air Conditioner Output in Key Regions

1.3 Product Structure

2. Development of Inverter Air Conditioner Industry of China

2.1 Sales

2.1.1 Market Structure

2.1.2 Market Penetration

2.2 Competition Pattern

2.3 Market Price

2.4 Consumer Concerns

2.4.1 Market Price

2.4.2 Brand

2.4.3 Product Performance

3. Import & Export of Air Conditioner in China

3.1 Import of Air Conditioner

3.2 Export of Air Conditioner

3.3 Export of Inverter Air Conditioner

4. Industry Policy

4.1 Government Amends and Implements New Energy Efficiency Standard for Air Conditioner

4.2 High-Efficiency and Energy-Saving Air Conditioner Subsidy Policy is Adjusted

4.3 “Replacement of Old Home Appliances with New Ones” Program will be Extended Until Late 2011

4.4 Inverter Air Conditioner is Included in the List of “Home Appliances Going to the Countryside”

4.5 Inverter Air Conditioner Technology is Included in the National Key Energy-Saving Technology Promotion Directory

4.6 Inverter Air Conditioner is Included in the Government Procurement List of Energy-Saving Products

4.7 Policy on the Exit of Low-Efficiency Inverter Air Conditioner from the Market will be Released

5. Key Manufacturers

5.1 Midea

5.1.1 Profile

5.1.2 Operation

5.1.3 Air Conditioner Business

5.1.4 Investment Planning

5.2 Gree

5.2.1 Profile

5.2.2 Operation

5.2.3 Air Conditioner Business

5.2.4 Investment Planning

5.3 Haier

5.3.1 Profile

5.3.2 Operation

5.3.3 Air Conditioner Business

5.3.4 Investment Planning

5.4 Hisense Kelon

5.4.1 Profile

5.4.2 Operation

5.4.3 Air Conditioner Business

5.4.4 Development Planning

5.5 AUX

5.5.1 Profile

5.5.2 Operation

5.5.3 Air Conditioner Business

5.6 Chigo

5.6.1 Profile

5.6.2 Operation

5.6.3 Air Conditioner Business

5.6.4 Development Planning

6. Development Trend of Inverter Air Conditioner Market of China

6.1 Industry Policy Adjustment Ensures a Bright Future

6.2 Market Competition will be more Diversified

6.3 Product Technology Upgrading will Pick Up

- Output and Sales Volume of China's Air Conditioner Industry, 2005-2010
- Retail Volume in China's Air Conditioner Market, 2005-2010
- Market Structure of China's Air Conditioner Industry by Brand, 2010
- Air Conditioner Industry Structure of China by Region, 2010
- Air Conditioner Output in Guangdong, 2005-2010
- Air Conditioner Output in Anhui, 2005-2010
- Air Conditioner Output in Hubei, 2005-2010
- Air Conditioner Output in Chongqing, 2005-2010
- Air Conditioner Output in Zhejiang, 2005-2010
- Air Conditioner Output in Shandong, 2005-2010
- Retail Volume Structure of China's Air Conditioner Market by Product, 2008-2010
- Monthly Retail Volume Structure of China's Air Conditioner Market by Product, 2010
- Retail Volume of Inverter Air Conditioner in China, 2008-2015E
- Retail Volume Change of China's Air Conditioner Market by Product, 2008-2010
- Retail Volume Structure of China's Air Conditioner Market by Product, 2008-2010
- Retail Volume Proportion of Inverter Air Conditioner Products in the Air Conditioner Market of China, Jan.-May, 2010
- Retail Volume Structure of China's Inverter Air Conditioner Market by Brand, 2008-2010
- Retail Volume Structure of China's Fluorine-Free Inverter Air Conditioner Market by Brand, 2008-2010
- Monthly Average Price of Inverter Air Conditioner in China, 2010
- Prices of Top 10 Inverter Air Conditioner Brands in China by Retail Volume, Dec. 2010
- China's Import Volume of Air Conditioners, 2005-2010
- China's Import Value of Air Conditioners, 2005-2010
- China's Export Volume of Air Conditioners, 2005-2010

- China's Export Value of Air Conditioners, 2005-2010
- China's Export Structure of Air Conditioners by Country, 2006-2010
- Change in China's Export Volume of Inverter Air Conditioners, 2010-2011
- New and Old Energy Efficiency Standards for Air Conditioner
- New Air Conditioner Energy Efficiency Grades, 2010
- Air Conditioner Subsidy Policy under New Energy Efficiency Standard
- Enterprises Included in the Fourth High-Efficiency and Energy-Saving Room Air Conditioner Promotion Directory under "Promoting Energy-saving Products for the Benefit of People" Program by Product Model
- Price Fixing and Subsidy for Air Conditioners Included in "Home Appliance Going to the Countryside Program", 2010
- Inverter Air Conditioner Energy Efficiency Grades
- Change in Energy Efficiency Standard of Inverter Air Conditioner, 2008-2011
- Operating Income and Net Income of Midea, 2005-2010
- Operating Income Structure of Midea by Product, 2008-2010
- Air Conditioner Product Structure of Midea, 2010
- Inverter Air Conditioner Product Structure of Midea, 2010
- Operating Income and Net Income of Gree, 2005-2010
- Operating Income Structure of Gree by Product, 2008-2010
- Air Conditioner Product Structure of Gree, 2010
- Inverter Air Conditioner Product Structure of Gree, 2010
- Operating Income and Net Income of Qingdao Haier, 2005-2010
- Operating Income Structure of Qingdao Haier by Product, 2008-2010
- Air Conditioner Product Structure of Qingdao Haier, 2010
- Inverter Air Conditioner Product Structure of Qingdao Haier, 2010
- Operating Income and Net Income of Hisense Kelon, 2005-2010

- Operating Income Structure of Hisense Kelon by Product, 2008-2010
- Air Conditioner Product Structure of Hisense Kelon, 2010
- Inverter Air Conditioner Product Structure of Hisense Kelon, 2010
- Sales Revenue of AUX, 2006-2010
- Air Conditioner Product Structure of AUX, 2010
- Inverter Air Conditioner Product Structure of AUX, 2010
- Operating Income and Net Income of Chigo, 2006-2010
- Operating Income Structure of Chigo by Product, 2008-2010
- Air Conditioner Product Structure of Chigo, 2010
- Inverter Air Conditioner Product Structure of Chigo, 2010

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