



China Low and Medium-voltage Inverter Industry Report, 2010-2011

Mar. 2011

This report

- ◆ **Analyzes development environment of low & medium-voltage inverters.**
- ◆ **Focuses on the market of low & medium-voltage inverters, such as market supply, demand and competition.**
- ◆ **Highlights the operation and development of major enterprises in low & medium-voltage inverters industry in China.**

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Abstract

Fueled by the increasing requirements of energy saving and environmental protection as well as the accelerated upgrading and alteration of equipment, China's low & medium-voltage inverter industry has progressed steadily in recent years at an annual average growth rate over 15%. Nevertheless, subject to the financial crisis, it geared down in 2009 and the market size throughout the year rose by 6.3% year on year to RMB11.9 billion, with RMB10.3 billion and RMB1.6 billion attributable to low-voltage inverter and medium-voltage inverter respectively. With the recovery of the Chinese economy and the advancement of downstream industries, the low & medium-voltage inverter market was estimated to grow by 16% in 2010, a substantial increase over 2009.

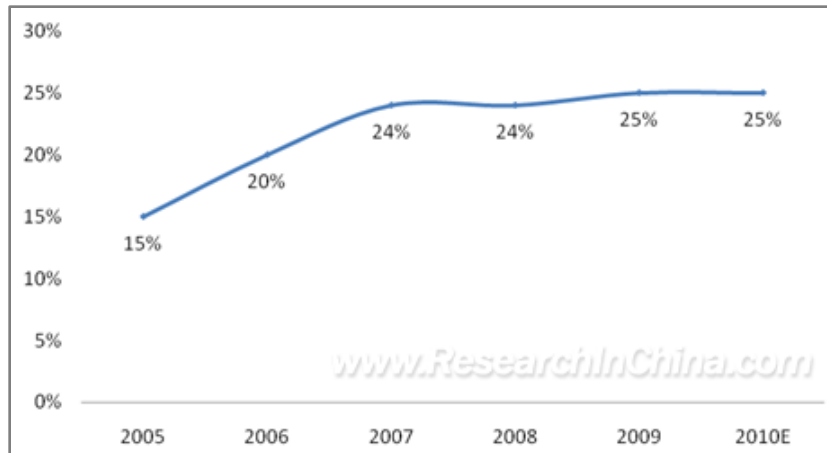
Starting with the industrial development environment, this report analyzes not only the market supply, demand and competition but 15 key enterprises as well.

Over the past two decades, enterprises at home and abroad have swarmed into the Chinese low & medium-voltage inverter market. Among them, there are Japanese brands like YASKAWA, Fuji Electric, Mitsubishi, and Sanken Electric,

European & American brands including Siemens, ABB, Emerson, and Rockwell Automation, as well as Taiwanese and South Korean brands like Delta Electronics, Inc. and LG. Nowadays, almost all the international low & medium-voltage inverter brands have tapped into the Chinese market and occupied 75% market shares.

Domestic brands have been fighting for a place in the market dominated by foreign brands, and a number of competitive enterprises have made their debut in recent years, including Shenzhen INVT Electric Co., Ltd. (INVT), Shenzhen Inovance Technology Co., Ltd. (Inovance), Eura Drives Electric Co., Ltd. (Eura Drives), and Hope Senlan Science & Technology Corp., Ltd. (SLANVERT). The expanding brand effect has promoted the market share of domestic brands to 25% in 2010 from 15% in 2005.

Share of Domestic Brands in Chinese Low & Medium-voltage Inverter Market, 2005-2010



Source: INVT; ResearchInChina

In contrast to foreign brands, domestic low & medium-voltage inverter brands are characterized by an extremely low market concentration ratio, and the top four domestic enterprises accounted for merely 6.2% of the domestic market sales in 2009. Furthermore, leading Chinese enterprises feature relatively scattered superior fields;

for instance, INVT highlights hoisting, wire drawing and coal fields, while Inovance gives priority to elevator and injection molding machine fields.

As for market application, low & medium-voltage inverters nearly involve all the fields of national economy, especially the hoisting machinery, textile & chemical fiber, and oil & gas drilling and exploitation industries which account for more than 30% market shares. Along with the transformation of inverters from “speed control” to “energy saving”, low & medium-voltage inverters have already extended to such emerging fields as elevator, machine tool, rail transit, home appliance, and energy. During the 12th Five-Year Plan period, China will continue to attach equal importance to speed control and energy saving, which will further promote the application of low & medium-voltage inverters in emerging markets. Promisingly, the market sizes of inverters for elevator, machine tool and rail transit will achieve RMB1.13 billion, RMB1.1 billion and 4,000 units respectively in 2011.

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