China Rail Transit Air-conditioning Industry Report, 2011

May 2011

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This report

- **Analyzes the status quo of China's rail transit air-conditioning industry.**
- **Focuses on China's rail transit air-conditioning market (2009) and developments of relevant industries (2000).**
- **Highlights the operation of key manufactruers in China.**

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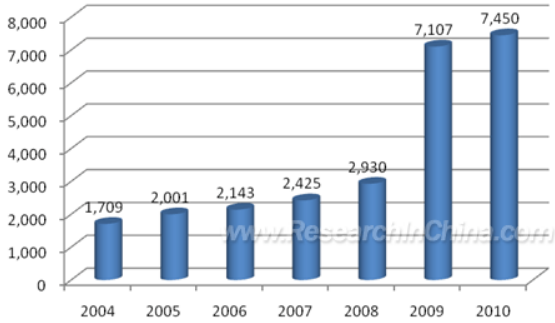
Abstract

China's rail transit industry has developed rapidly in recent years. As of the end of 2010, China's railway mileage reached 91,000 km, an increase of 4,986 km over 2009; the in-service high-speed railway mileage reached 8,358 km.

By the end of 2010, 12 cities including Beijing and Shanghai had built up urban light rails and subways, with a total of 48 lines and a mileage of 1,356 km. the extension of rail lines has increased the demand for rail vehicles. For example, the railway passenger car output increased from 1,709 in 2004 to 7,450 in 2010.

China's Railway Passenger Car Output, 2004-2010



China's Railway Passenger Car Output, 2004-2010

The demand for rail transit air-conditioning increased from 67,800 sets in 2007 to 136,800 sets in 2010, at an average annual growth rate of 26.4%. Railway passenger car and subway & urban rail respectively accounted for 76% and about 20% of the total demand.

Because of the technical barriers and strong supporting bonding, the rail transit air-conditioning market is relatively closed, with a total of not more than 10 manufacturers in China. Top five manufacturers Shijiazhuang King, Guangzhou Zhongche, Shanghai Faiveley, Jiangsu New United and Wuxi Merak Jinxin occupied more than 90% of the market.

Shijiazhuang King is the largest rail transit air-conditioning equipment supplier in China. It provides both CSR and CNR with subway, light rail as well as regular and high-speed train air conditioning equipment.

Guangzhou Zhongche is a rail vehicle air-conditioning manufacturer designated by the Ministry of Railways of China, and is also an OEM of subway and light rail vehicle air-conditioning systems.

Shanghai Faiveley is a rail transit equipment supplier established by German Faiveley and Shanghai Electric. It provides equipment for rail vehicle manufacturers at home and abroad.

Jiangsu New United cooperates with Alstom and Siemens in technology, and has a stable customer base. Although its share in the rail transit air-conditioning market is not large, its growth shows a steady upward trend.

Wuxi Merak Jinxin is a joint venture held by Merak Spain and Wuxi Jinxin Group. It’s engaged in the design and manufacturing of air-conditioning systems for subway and light rail vehicles.

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