



China Gear Industry Report, 2010-2011

Jun. 2011

This report

- ◆ **Analyzes the industrial chain, upstream & downstream industries of global and China gear market.**
- ◆ **Focuses on market segments of gear industry in China, including vehicle gear, construction machinery gear, marine gear, and wind power gearbox.**
- ◆ **Highlights the operation of key enterprises in China.**

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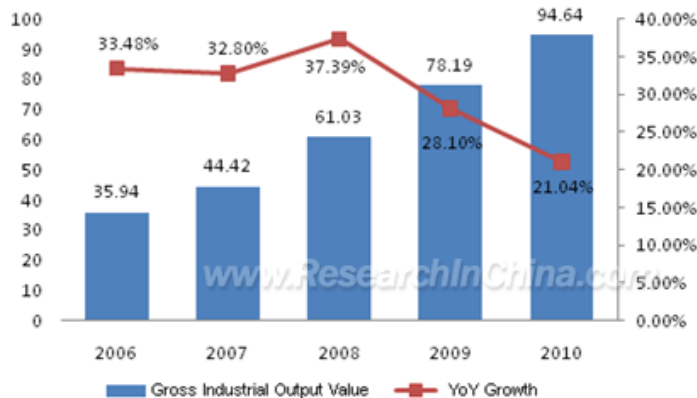
China Inverter Welding and Cutting Equipment Industry Report, 2010-2011

Abstract

Over the past five years, China gear industry witnessed high-speed development and its size got a constant expansion. The total output value increased by 28.1% year on year to RMB78.19 billion in 2009, and reached RMB94.64 billion in 2010.

By the end of 2010, the aggregated demand from China gear market was worth above RMB140.0 billion, more than doubled of RMB68.3 billion in 2005.

Output Value of Gear Industry in China, 2006-2010 (RMB billion)



Source: CGMA

In 2010, the market demand for gears was largely fueled by the fast development of China wind power gear market and automobile market. In the same year, China's gear industry achieved the total output of 726.86t, climbing by 21.8% year on year; the sales of gear parts were RMB72.57 billion (excluding driveline), growing by 20% year on year; the whole year's import value was US\$9.8 billion, up 35% year on year; the export value was US\$2.2 billion, a hike of 28% year-on-year; and the import and export deficit was up to US\$7.6 billion. The import for automobile automatic transmission had a leading position.

Major Gear Enterprises in China, 2010

Enterprise	Sales (RMB billion)	Business Scope
China High Speed Transmission Equipment Group	7.39	Industrial gear
Shaanxi Fast Group	12.6	Vehicle gear
Zhejiang Shuanghuan Driveline	0.83	Vehicle gear
Ningbo Donly Transmission Equipment	0.7	Industrial gear
Hangzhou Advance Gearbox Group	2.21	Marine gear and industrial gear

Source: ResearchInChina

In 2010, Shaanxi Fast Auto Drive Group Co., Ltd. achieved the sales of RMB12.618 billion, rising by 67.3%; and it is the first enterprise with the production and sales exceeding RMB10 billion in the gear industry.

Coupling with the growth of Chinese wind power gearbox market, China High Speed Transmission Equipment Group Co., Ltd. accomplished sales of RMB7.393 billion in 2010, mounting by 30.9% comparing with RMB5.647 billion in 2009, and the sales in 2011 is expected to exceed RMB10 billion.

Zhejiang Shuanghuan Driveline Co., Ltd. is dedicated to the production of vehicle gear parts, thanks to the prosperity of automobile industry, its operating income in 2010 reached RMB834.1 million.

Ningbo Donly Transmission Equipment Co., Ltd., focusing on the production of industrial gears, provides 50% of its products to the metallurgical industry. With the widening of the product line, Donly will stretch its products to the mining, power, lifting and transport, wind power and railway fields, giving priority to the development of the lifting and transport, building materials and other industries, whose market sizes are above 3 times bigger than that of the metallurgical industry.

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