



China Elevator Industry Report, 2010-2011

Sep. 2011

This report

- ◆ **Analyzes the competition of elevator industry in China**
- ◆ **Focuses on the demand and supply , import and export of elevator industry**
- ◆ **Highlights the operation of key elevator enterprises also elevator-related products enterprises in China**

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Abstract

Safety is the keyword in Chinese elevator market in 2011. A retrograde escalator accident has raised public doubts about the quality of Otis elevators. General Administration of Quality Supervision, Inspection and Quarantine of China issued an emergency notice urging an immediate nationwide halt to usage of Otis 513MPE escalators.

The retrograde accident has caused adverse effects on the production and marketing of Otis, but created a rare opportunity for Otis' rivals Shanghai Mitsubishi and Hitachi to seize market share. In 2011, Shanghai Mitsubishi has won orders for over 40,000 elevators, and its new escalator project was put into full production in the first half of the year and strives for an output of 4,000-4,500 escalators in 2011. Hitachi Elevator currently has an annual capacity of 35,000 units, has formed a strategic layout consisting of "a headquarters, two R&D centers and three manufacturing bases", and has set up large manufacturing bases in Guangzhou, Tianjin and Shanghai.

Rapid economic growth and urbanization have spurred the development of China's elevator industry. China's elevator output grew at a CAGR of 23.3% in 1999-2009, and reached 365,000 units in 2010, up 39.1% year on year. In the first half of 2011, the output increased by about 40% year on year.

With the development of China's elevator industry, China's local elevator companies have also grew up. The market share of local brands was only one fifth in 2008, increased to about a quarter in 2010, and finally reached one third in the first half of 2011. The emergence of local brands like SJEC Corporation, Shanghai YungTay and Canny Elevator (002367) is changing the Chinese elevator market pattern dominated by foreign brands.

This Report analyzes the supply and demand as well as the competition in China's elevator market, and introduces the supply and demand, market scale, competitive landscape and key enterprises in elevator-related industries including elevator control system, elevator inverter and elevator guide rail.

Shanghai STEP Electric Corporation is a representative enterprise in China's elevator control system and elevator inverter industry, while Changjiang Runfa Group is the one in the elevator guide rail industry. Shanghai STEP Electric Corporation is the largest elevator control system OEM in China, and its key accounts include Otis and Schindler.

Top Five Elevator Clients of Shanghai STEP Electric Corporation, 2010-H1 2011 (Unit: RMB mln)

Client	2010		H1 2011	
	Sales	Share	Sales	Share
Otis Elevator Company and its affiliated companies	91.62	18.25%	65.88	22.41%
Sanyo Elevator and its affiliated companies	29.31	5.84%	12.30	4.18%
Shanghai East Best International Business Development Co., Ltd.	25.19	5.02%	10.64	3.62%
Guangzhou Guangri Elevator Industry Co., Ltd.	21.63	4.31%	9.20	3.13%
Volslift Elevator Co., Ltd.	16.11	3.21%	9.18	3.12%
Total	183.87	36.63%	107.20	36.46%

Source: ResearchInChina



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