



China Low and Medium-voltage Inverter Industry Report, 2011-2012

Apr. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

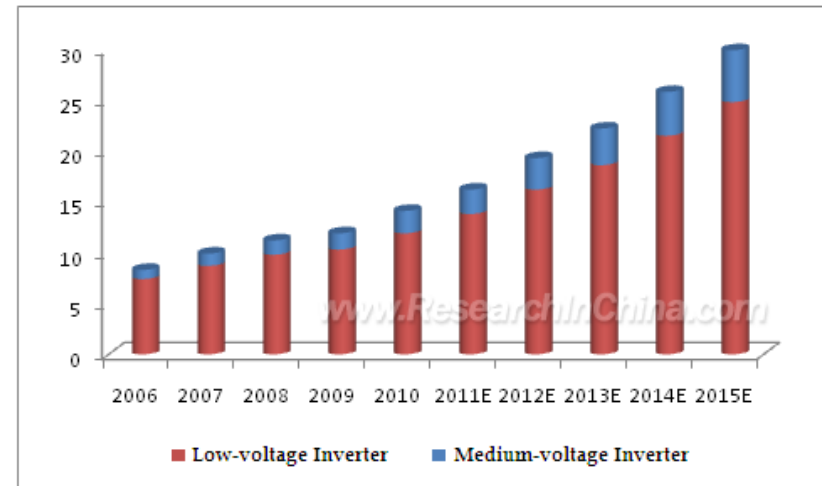
The primary information sources include NBS(National Bureau of Statistics of China), WIND, and prospectus of the listed companies' etc.

Abstract

Inverter is a device enabling the motor to run at variable speeds for energy conservation, and low and medium-voltage inverters generally refer to the inverters below 3kV. Along with the boosting demand for energy efficiency and environmental protection, as well as the accelerated equipment upgrading and transformation, the low and medium-voltage inverter industry has grown steadily in China, with annual growth rate averaging 14.82% in 2006-2010.

In terms of market structure, low-voltage inverter is the mainstream, accounting for over 85% market share, and medium voltage inverter makes up less than 15% because of its narrower range of application.

Market Size of Low and Medium-voltage Inverters in China (by Sales), 2006-2015E (Unit: RMB bn)



Source: ResearchInChina, China Low and Medium-voltage Inverter Industry Report, 2011-2012

Chinese low and medium-voltage inverter industry is characterized by the followings:

Foreign brands possess apparent advantages. By virtue of state-of-the-art technology and early entry, foreign brands represented by Siemens, ABB, Yaskawa and Schneider occupy around 75% of the Chinese market. In 2011, the top five foreign brands (by sales) together constituted 64.3% of the total sales in China. The low and medium-voltage inverter market in China is expected to be monopolized by foreign brands in the coming five years.

Domestic brands are less concentrated. Compared with foreign brands, the domestic low and medium-voltage inverter brands are characterized by a low concentration degree. The top 4 domestic manufacturers occupied only 8.3% of the Chinese market by sales in 2011. Moreover, the advantageous fields of leading Chinese enterprises are relatively dispersed. For instance, INVT specializes in the production of inverters for lifting machinery, wire drawing and coal fields, while Inovance focuses on inverters for elevators and injection molding machines.

Hoisting machinery presents the most robust demand. Low and medium-voltage inverters are extensively applied in hoisting machinery, textile and chemical fiber, machine tools, plastics, oil & gas drilling, oil & gas and petrochemical sectors. The inverters for hoisting machinery, textile and chemical fiber, and oil & gas drilling ranked the top three in sales which amounted to RMB1.92 billion, RMB1.78 billion and RMB1.54 billion respectively in 2011.

Distribution serves as the major sales channel. Most of low and medium-voltage inverter manufacturers sell their products mainly through agents and partly by direct sales modes including project bidding and OEM for system integrators.

It is in the report that covers the followings:

- ▶ The status quo, supply & demand and development trend of Chinese low and medium-voltage inverter industry;
- ▶ The development environment, market size, brand and channel competition of low and medium-voltage inverter industry;
- ▶ Highlighting the downstream application sectors of low and medium-voltage industry and analyzing the development of inverters for lifting machinery, elevator, machine tool, rail transit and home appliances;
- ▶ Analyzing the operation, project planning and forecast of 15 low and medium-voltage inverter manufacturers in China.

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