

China Elevator Industry Report, 2011-2012

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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 National Bureau of Statistics of China, China Customs and China Elevator Association etc.

Abstract

China's elevator industry is still in a period of fast development. In 2011, the demand from the downstream indemnificatory housing construction offset adverse effects of the real estate downturn, thus China's elevator production continued to lead the world by climbing 23% YoY to 450,000 units.

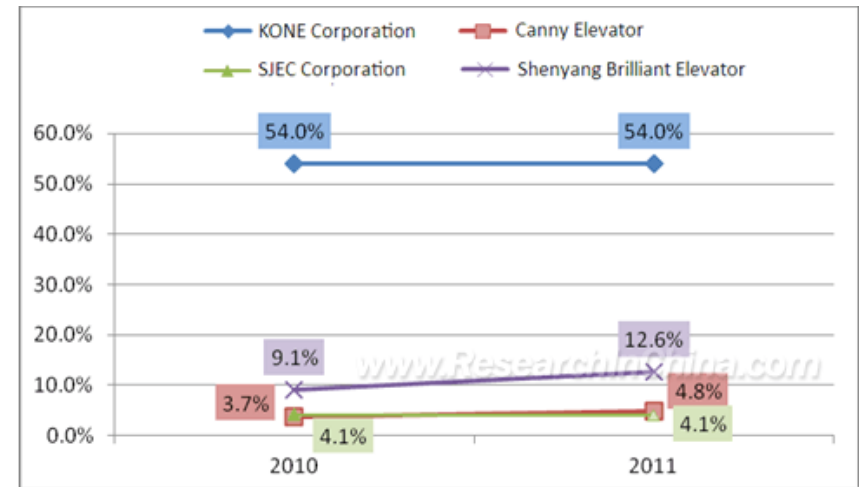
At present, China's per capita ownership of elevator in service is 14.8 units / 10,000 persons, which is about 60% of the world's average 23.88 units / 10,000 persons, far from saturated.

As the elevator ownership continues to expand, repair & maintenance, transformation and other service-oriented markets will see rapid growth, and the installation and maintenance revenue will turn into an important source of revenue for Chinese elevator manufacturers in future.

Currently, the installation and maintenance revenue percentage of Chinese elevator manufacturers is generally not high, e.g., domestic enterprises basically maintain a maintenance revenue percentage of 3-13%, while in developed countries, the maintenance revenue percentage generally exceeds 50%.

Among leading domestic enterprises, Shenyang Brilliant Elevator Co., Ltd. has the highest maintenance revenue percentage, which was up to 12.6% in 2011.

Maintenance Revenue Percentage of Elevator Companies in the World and China, 2010-2011



Source: ResearchInChina < China Elevator Industry Report, 2011-2012 >

Confronted with the increasingly fierce market competition, via public financing to enhance competitiveness, narrow the gap with foreign capital and expand market share as much as possible has become an inevitable choice for the development of Chinese elevator enterprises.

In 2010-2012, Chinese elevator enterprises ushered in a listing boom. Following the successful listing of Canny Elevator on March 12, 2010, SJEC Corporation entered the Shanghai Stock Exchange with flying colors on January 16, 2012, so will Shenyang Brilliant Elevator and Suzhou Dongnan Elevator, and other private companies also have plans for listing.

Meanwhile, major foreign elevator manufacturers are accelerating the pace of expansion in the Chinese market.

On December 1, 2011, KONE Corporation announced to invest RMB950 million to increase a 40% stake in GiantKONE, thus becoming the largest shareholder by holding 80% of shares.

In April 2011, Schindler acquired a 46% stake in Xuchang XJ Elevator Co., Ltd., formally making the latter its joint venture and further increasing its share in China's second- and third-tier elevator market.

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