



# **China Screw Air Compressor Industry Report, 2013**

**May 2013**

## 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

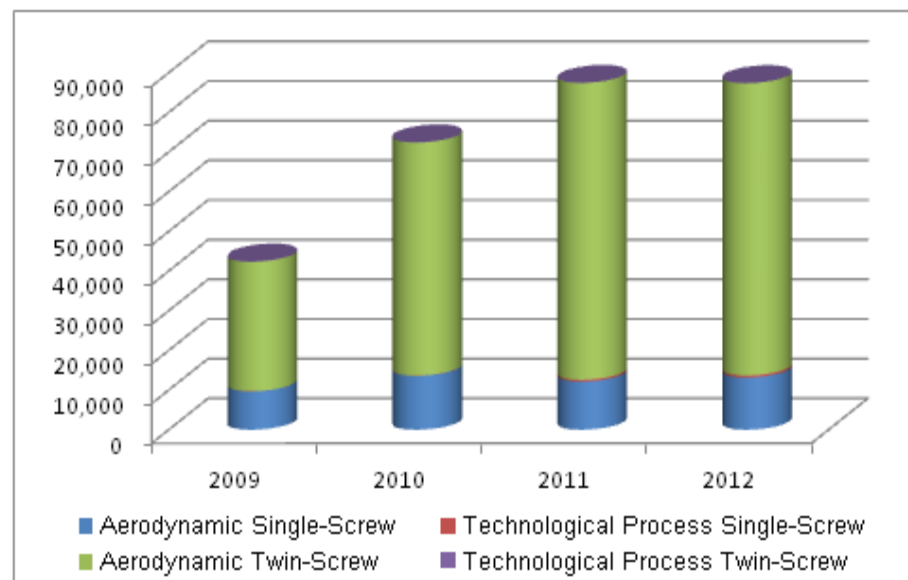
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

In 2003-2009, promoted by the rapid development of downstream industries, China's demand for air compressor and other related general machinery grew fast. Since 2009, impacted by the global economic crisis, downstream sectors have reduced the investment and hence the demand for compressors. In 2012, the total output value reached RMB 11.34 billion, an increase of 8.9% over the previous year.

Screw compressors consist of twin-screw and single-screw types. The single-screw compressor features balanced stress, long service life, small leakage, high volumetric efficiency, better energy efficiency and therefore increasing application. In 2012, the sales volume of aerodynamic single-screw air compressor and technological process single-screw air compressor hit 13,153 and 553 respectively, up 8.4% and 8.3% year on year separately; the sales volume of aerodynamic twin-screw air compressor was 73,654, down 1.6% from a year earlier, while the sales volume of technological process twin-screw air compressor achieved 56, up 4.5% year on year.

**Sales Volume of Screw Compressor in China by Product, 2009-2012**



Source: China General Machinery Industry Yearbook;  
ResearchInChina China Screw Air Compressor Industry Report, 2013

The replacement of reciprocating compressor with screw compressor will continue. (1) in terms of sales volume, the share of screw compressor in China's air compressor market is less than 20%, far lower than those in developed countries (which are over 80%), so there is still a large space for the replacement of reciprocating compressor with screw compressor; (2) the 12th Five-Year Plan once again raised the energy efficiency targets of air compressor, and the launch of related energy-saving and environmental protection policies will further highlight the energy saving advantages of screw compressor. It's expected that the share of screw compressor in China's air compressor market will reach 78.5% and the market size of screw compressor will hit RMB 15.9 billion in 2016.

**China Screw Air Compressor Industry Report, 2013 mainly covers the followings:**

Overview of China's screw air compressor industry, including the development history, policies and regulations, market size, current development and future development trends of the industry;

Analysis of major screw air compressor market segments in China, involving the market size, competitive landscape and development trends of single-screw air compressor, twin-screw air compressor and oil-free screw air compressor;

Introduction to four global companies including Fusheng, Sullair, Atlas, and Ingersoll Rand as well as seven Chinese screw compressor enterprises such as Kaishan, Hanbell and Wuxi Compressor, covering company profile, financial analysis, capacity layout, latest strategic developments, etc.

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