



# China Scroll Compressor Industry Report, 2013

June 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

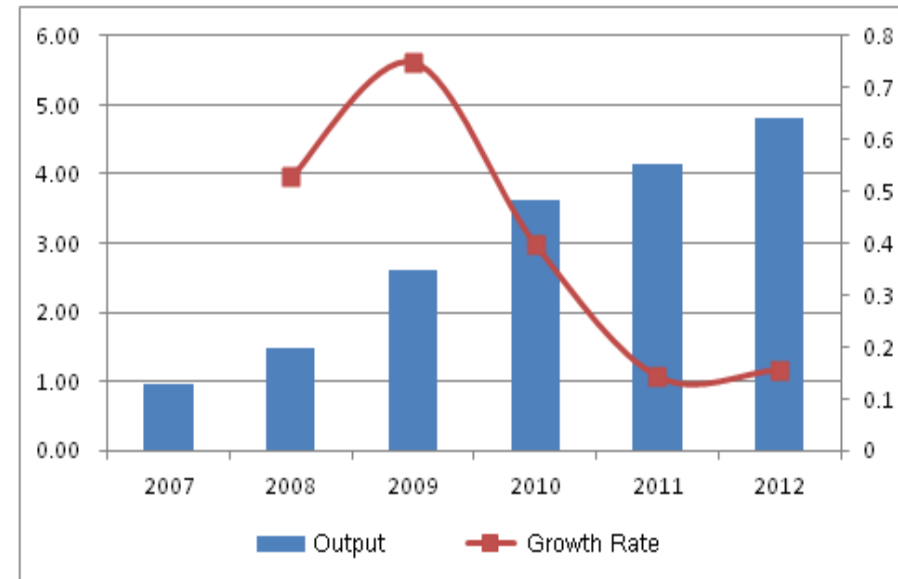
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

Since 2003, benefiting from the rapid development of automotive industry and commercial air-conditioning industry, the demand for related general machinery such as compressor has grown fast. Scroll compressor as a new-type, energy and material saving, and low-noise positive displacement compressor has witnessed swift market development. The market of scroll refrigerant compressor and automotive scroll air-conditioning compressor increased from 2 million and 970,000 units in 2007 to 3.9 million and 4.81 million units in 2012 respectively.

Refrigerant scroll compressors consist of fixed-speed and inverter types. Major manufacturers of fixed-speed scroll compressor include Emerson Copeland, Dalian Sanyo, Guangzhou Hitachi, Xi'an Daikin and Danfoss. Emerson Copeland holds an advantageous position in the 3HP market, while Dalian Sanyo occupies a big share in the 5HP market. Inverter scroll compressors are mainly supplied to inverter multi-split air-conditioner manufacturers. Major manufacturers include Guangzhou Hitachi, Suzhou Daikin, Mitsubishi Electric and Dalian Sanyo. Suzhou Daikin mainly supplies products to Daikin Air-conditioning (Shanghai), while Guangzhou Hitachi primarily serves Hisense Hitachi and Midea.

**Output of Scroll Automotive Air-conditioning Compressor in China, 2007-2012 (mln units)**



Source: ResearchInChina China Scroll Compressor Industry Report, 2013

With merits like light weight and low energy consumption, automotive scroll compressors are particularly applicable to electric vehicles. Major manufacturers in China include Nanjing AoteCar and Dongguan Keihin. The capacity and output of Nanjing AoteCar in 2012 recorded 4 million and 3.8 million units respectively.

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

Overview of China scroll compressor industry, including industry development history, policies, laws and regulations, market size, current development and future development trends;

Analysis on major market segments of scroll compressor in China, including the market size, competition pattern and development trends of market segments such as automotive air-conditioning scroll compressor and commercial air-conditioning compressor;

Introduction to six foreign manufacturers of commercial refrigerant scroll compressor including Daikin, Emerson, Secop, Hitachi, Samsung and Sanyo as well as China Automotive Systems, the largest local automotive scroll compressor producer of China, involving company profile, financial data of listed company, capacity distribution and the latest strategic development.

### 1. Scroll Compressor Industry

- 1.1 Definition and Classification
- 1.2 Industry Supervision, Laws and Regulations
- 1.3 Industry Policies

### 2 Scroll Refrigerant Compressor

- 2.1 Scroll Refrigerant Compressor
  - 2.1.1 Market Size
  - 2.1.2 Competition Pattern of Constant-speed Scroll Compressor
  - 2.1.3 Competition Pattern of Inverter Scroll Compressor
- 2.2 Market Segments
  - 2.2.1 Air-conditioning Scroll Compressor Market
  - 2.2.2 Cold Chain Scroll Compressor Market
  - 2.2.3 Market Size of Scroll Refrigerant Compressor in China, 2013-2016E
- 2.3 Major Application Market
  - 2.3.1 Commercial Air-conditioning Industry
  - 2.3.2 Cold Chain Industry

### 3. Scroll Automotive Air-conditioning Compressor

- 3.1 Evolution of Automotive Air-conditioning Compressor
- 3.2 Market Size of Automotive Scroll Air-conditioning Compressor
- 3.3 Competition Pattern
- 3.4 Market Forecast

### 4 Major Scroll Compressor Companies

- 4.1 Daikin
  - 4.1.1 Profile
  - 4.1.2 Business Review
  - 4.1.3 Main Products
  - 4.1.4 Xi'an Daikin Qing'an Compressor Co.,Ltd.
  - 4.1.5 Daikin Device (Suzhou) Co., Ltd.
- 4.2 Emerson
  - 4.2.1 Profile
  - 4.2.2 Business Review
  - 4.2.3 Main Products
  - 4.2.4 Emerson Climate Technologies (Suzhou) Co., Ltd.
  - 4.2.5 Emerson Climate Technologies (Shenyang) Refrigeration Co., Ltd.
- 4.3 Secop
  - 4.3.1 Profile
  - 4.3.2 Main Products
  - 4.3.3 Secop Compressors (Tianjin) Co., Ltd.
- 4.4 Hitachi
  - 4.4.1 Profile
  - 4.4.2 Business Review
  - 4.4.3 Main Products
  - 4.4.4 Hitachi Compressor Products (Guangzhou) Co., Ltd.
- 4.5 Sanyo
  - 4.5.1 Profile
  - 4.5.2 Business Review

- 4.5.3 Main Products
- 4.5.4 Dalian Sanyo
- 4.6 Samsung
  - 4.6.1 Profile
  - 4.6.2 Business Review
  - 4.6.3 Main Products
  - 4.6.4 Suzhou Samsung Electronics Co., Ltd.
- 4.7 China Automotive Systems
  - 4.7.1 Profile
  - 4.7.2 Main Products
  - 4.7.3 Development in 2012-2013
  - 4.7.4 Nanjing AoteCar

- Classification of Refrigeration Compressors
- Application of Refrigeration Compressors by Type
- Quarterly Sales Volume of Refrigerant Scroll Compressor in China, 2011-2013
- Market Structure of Fixed-Speed Scroll Compressor, 2012
- Supply Relationship Between DC Inverter Scroll Compressor Manufacturers and Downstream Inverter Multi-split Air-conditioner Manufacturers
- Share of Major Manufacturers in Inverter Multi-split Air-conditioner Market, 2010-2012
- Sales of Multi-split Central Air-conditioner and its Proportion to Sales of Central Air-conditioner, 2008-2012
- Sales of Modular Central Air-conditioner and its Proportion to Sales of Central Air-conditioner, 2008-2012
- Scroll Air-conditioning Compressor Suppliers of Major Air-conditioner Manufacturers in China
- Output of Cold Chain Scroll Compressor in China, 2008-2012
- Sales Volume of Refrigerant Scroll Compressor in China, 2011-2016E
- Sales of Central Air-conditioner in China, 2008-2012
- Cold Chain Demand in China, 2010-2012
- Sales Volume of Refrigerated Truck in China, 2007-2012
- Cold Chain Supply and Demand by Category
- Comparison of the Four Generations of Automobile Air-conditioning Compressors
- Specifications and Applications of Scroll Automotive Air-conditioning Compressors
- Output of Automotive Air-conditioning Compressor in China, 2007-2012
- Output of Scroll Automotive Air-conditioning Compressor in China, 2007-2012
- Output Structure of Scroll Automotive
- Air-conditioning Compressor in China, 2007-2012
- Market Share of Automotive Scroll Air-conditioning Compressor in China, 2012
- Sales Volume of Automotive Scroll Air-conditioning Compressor in China, 2011-2016E
- Revenue and Net Income of Daikin, FY2007-FY2012

- Revenue Breakdown of Daikin by Product, FY2012
- Revenue Breakdown of Daikin by Region, FY2012
- Main Scroll Compressor Product of Xi'an Daikin
- Profile of Xi'an Daikin Qing'an Compressor Co.,Ltd.
- Main Subsidiaries and Products of Daikin Air-conditioning Division in China
- Revenue and Net Income of Daikin, FY2008-FY2013
- Revenue Breakdown of Emerson by Product, FY2012
- Revenue Breakdown of Emerson by Region, FY2012
- Main Scroll Compressors of Emerson Climate Technologies
- Main Scroll Compressor Products of Emerson Climate Technologies (Suzhou)
- Main Compressor Products of Emerson Climate Technologies (Shenyang) Refrigeration in China
- Main Compressor Series and Applications of Secop
- Revenue and Net Income of Hitachi, FY2008-FY2012
- Revenue Breakdown of Hitachi by Product, FY2011-2012
- Revenue Breakdown of Hitachi by Region, FY2012
- Main Scroll Compressors of Hitachi
- Main Scroll Refrigerant Compressor Products and Performance of Guangzhou Hitachi
- Revenue and Net Income of Panasonic, FY2008-FY2012
- Revenue Breakdown of Panasonic by Product, FY2011-2012
- Revenue Breakdown of Panasonic by Region, FY2011-2012
- Scroll Compressor Product Series of Sanyo
- Main Compressor Products of Dalian Sanyo Compressor
- Revenue and Net Income of Samsung, 2007-2012
- Revenue Breakdown of Samsung by Product, 2012
- Revenue Breakdown of Samsung by Region, 2012

- Scroll Compressor of Samsung
- Major Compressor Clients of China Automotive Systems
- Major Scroll Automotive Air-conditioning Compressor Products of China Automotive Systems
- Automotive Applications of Major Product Series
- Major Clients of AoteCar
- Major Clients of Nanjing AoteCar



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