



**China Air Compressor Industry Report,
2013**

Aug. 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.

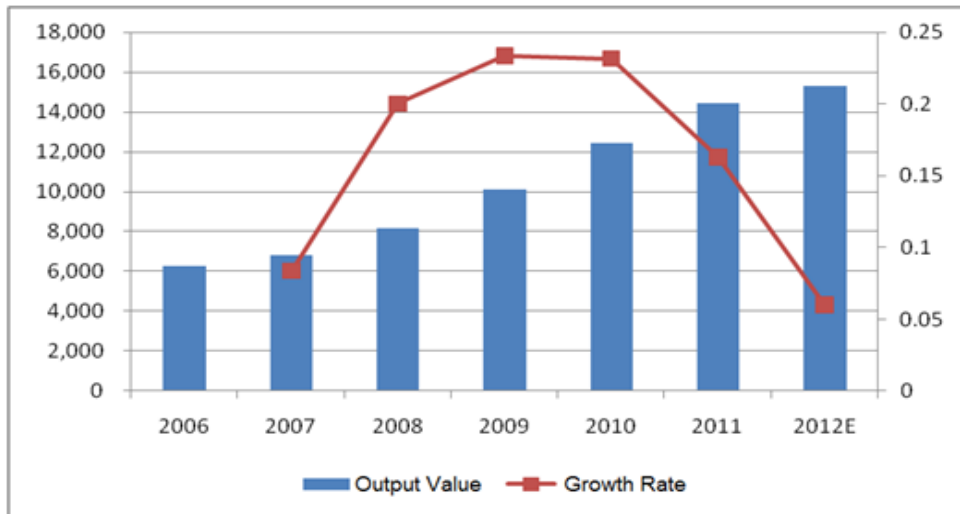
INFORMATION SOURCES

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

Abstract

With the growth of Chinese economy, the demand for air compressors keeps rising, fueling the spring-up of China air compressor manufacturing industry. According to the statistics from China General Machinery Industry Association Compressor Sub-Association, the output value of compressors increased by 16.3% to RMB14.454 billion in 2011, while that in 2012 grew by roughly 6% to RMB15.321 billion.

Output Value of Air Compressors, 2006-2012 (RMB mln)



Source: China General Machinery Industry Yearbook;

ResearchinChina China Air Compressor Industry Report, 2013

The most popular air compressors in China are screw compressors and piston air compressors. The former has such merits of energy conservation and cost effectiveness that gain wide acceptance in the market, so the market growth is well above the industrial average and it may well be that the screw compressor will replace piston air compressor. In 2006-2012, the market occupancy of screw compressor soared to 74% from 52% in China air compressor market, while the output value in 2012 hit RMB11.34 billion. By contrast, the output value of piston air compressor posted RMB3.33 billion, while the sales percentage dived to 21.7% of China's total.

As of 2013, China's top air compressor enterprises include Kaishan Group, Zhejiang Hongwuhuan, JCEP, Shanghai Feihe Industrial Group, and Wuxi Compressor. In particular, Kaishan Group holds an advantage in the R&D of new products. In 2012, the sales from screw compressor business of Kaishan accounted for 71.92%, while that from piston air compressor business made up 11.98%. In 2013, Kaishan is scheduled to highlight the R&D of high-pressure screw air compressors. As long as high-pressure screw air compressors are industrialized, Kaishan will seize some market shares from Atlas Copco and Sullair.

The report sheds light on the followings:

---overview of China air compressor market: industrial evolution, laws and regulations, market scale, status quo and prediction;

---China air compressor market breakdown: market scale, competition pattern and development trend of screw compressor, piston air compressor, centrifugal compressor , axial-flow compressor, etc.

---Profile, financial data, capacity layout, development in China and the latest strategy of 9 domestic air compressors, including Kaishan, HanBell Precise Machinery, Xi'an Shaangu Power, Jingtongling, Wuxi Compressor, as well as 7 well-known foreign peers like Ingersoll Rand, Atlas Copco, Fusheng, GE, Siemens, and Cameron.

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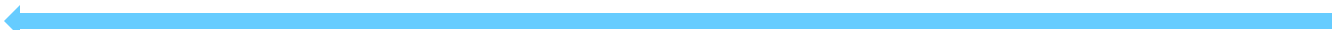
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