

Global and China Industrial Automation Industry Report, 2013-2015

Dec. 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.

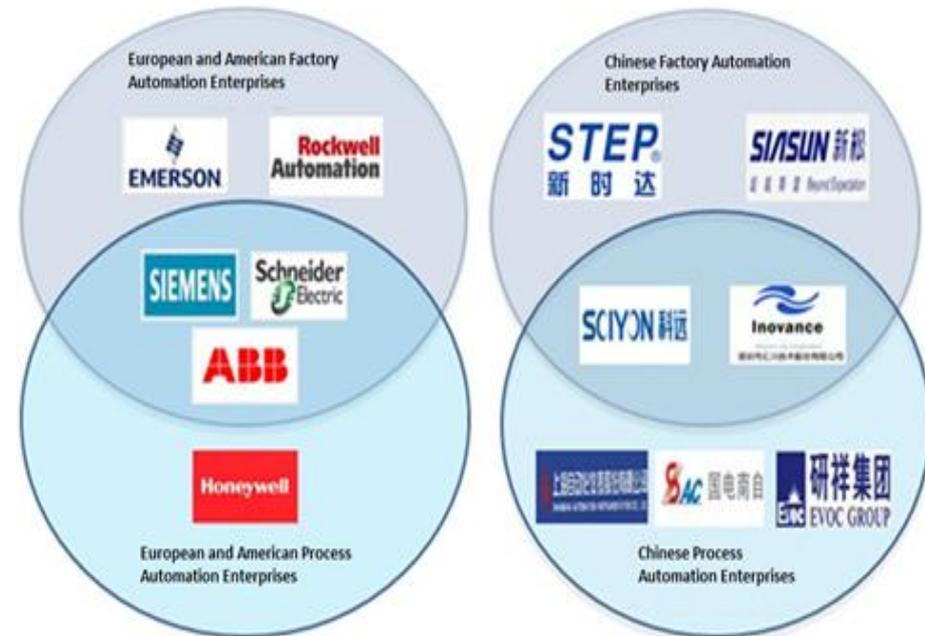
Abstract

At present, China's domestic industrial automation enterprises still lag behind foreign counterparts in technology, brand, product range and other aspects. However, domestic enterprises have certain advantages in cost, price, distribution channels, market segments expanding, personalized services and so on. In 2013, the market share of Chinese companies has not exceeded 30%, therefore the potential for them to substitute foreign brands is enormous.

In the first half of 2013, China has 797 small-sized automation enterprises above designated size, accounting for 81.7% of the total number of enterprises in the industry, and 152 mid-sized automation enterprises, accounting for 15.6%, and 26 large enterprises, representing 2.7%.

Jiangsu is the province with the largest number of enterprises which is 342. In the first half of 2013, the total assets of China's industrial automation enterprises above designated size are RMB 212 billion, increasing 14.9% year on year. The top five provinces/cities by assets are Jiangsu, Beijing, Zhejiang, Shanghai and Guangdong.

Global and Chinese Factory Automation and Process Automation Enterprises



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Global and China Industrial Automation Industry Report, 2013-2015 sheds light on the operation and development plans of domestic and foreign enterprises based on an analysis and forecast of the global and Chinese industrial automation industry trend.

Siemens is the world's largest industrial automation company; its automation business covers factory automation equipment and process automation equipment, its service areas include energy, industry, construction and health care industries. In FY2013, Siemens achieved revenue of EUR 75.9 billion, down 2% year on year and net income of EUR 4.41 billion, up 3% year on year.

Although annual report shows that net income of Siemens has increased in FY2013, its industrial automation business performance was not satisfactory, the revenue from which is declining year after year due to weak demand and rising costs. Hence, Siemens decided to enrich its product line and increase investment in information technology and software businesses which have higher profit margin and reduce the output of low-margin products such as photovoltaic inverters.

Shenzhen Inovance Technology Co., Ltd (stock code: 300124) is China's most powerful local automation company with the most extensive range of services. Its clients cover metallurgy, coal, water, chemical, municipal, electricity and other fields.

In the first half of 2013, the traditional industrial control market rallied, increase of demand for elevators and injection molding machines which are the advantages of the company has driven its revenue growth. Benefited from industrial policies, new energy vehicle motor controllers and photovoltaic inverters gradually open up the market. The company has significantly enhanced performance, making revenue of RMB 702 million in the first half of 2013, increasing 32.8% compared to the same period in 2012 and net income of RMB 227 million, increasing 58.2%.

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