



Global and China Low and Medium-voltage Inverter Industry Report, 2013-2016

Jun. 2014

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 2013, the rising demand from China's industrial control industry helped drive the recovery of low and medium-voltage inverter market, with the market size of low and medium-voltage inverters in China for the year hitting about RMB22.57 billion, up 5.2% from a year earlier.

In terms of market structure, the market was dominated by low-voltage inverters, while medium-voltage inverters, due to limited application, occupied a far smaller market share than low-voltage inverters. However, China witnessed a rise in the proportion of medium-voltage inverters in the low and medium-voltage inverter market, from 8.7% in 2006 to roughly 15.8% in 2013, hence with broad development prospects.

In the field of low and medium-voltage products, the Chinese enterprises mainly produce V/F control products. As for the products such as vector inverter with superior performance and high technical content, the overwhelming majority of Chinese enterprises still not have developed mature products. Currently, the major local players in Chinese low and medium-voltage inverter market are comprised of INVT, Inovance Technology, STEP Electric, Hiconics Drive Technology and EURA DRIVES, etc. In 2013, Inovance Technology

occupied a 3.4% market share, making it the manufacturer with the biggest market share in China.

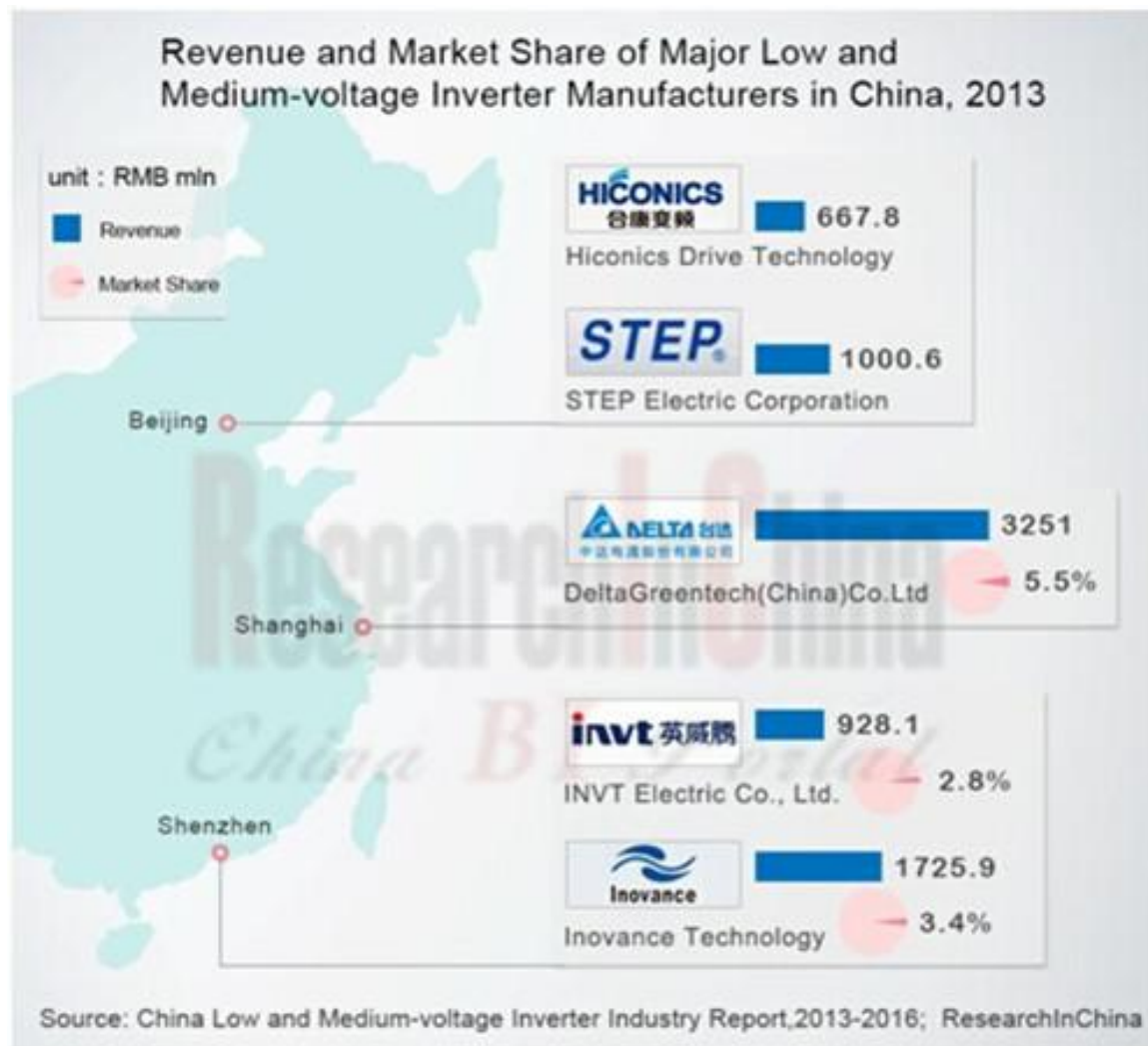
At present, the market share of foreign manufacturers in the Chinese low and medium-voltage inverter market exceeds 70%. In 2013, the top 5 low and medium-voltage inverter manufacturers by market share were all foreign companies, namely ABB, Siemens, Yaskawa, Delta Electronics and Schneider Electric, of which the market share of ABB and Siemens were 16.6% and 15.4%, respectively.

Hoisting machinery and elevators are the major two industries in which the Chinese low and medium-voltage inverters are widely used. And in 2013, the market size of the low and medium-voltage inverters for hoisting machinery and elevators in China reached approximately RMB3.24 billion and RMB2.12 billion, respectively. Market concentration rate of low and medium-voltage inverters for elevators was relatively higher in China, and the top 3 suppliers in terms of market share in 2013 were Inovance Technology, Emerson and Yaskawa. In addition, Fuji Electric and Schneider Electric also held a certain market share.

Energy conservation and environmental protection are the driving force to promote the development of China's low and medium-voltage inverter industry. Frequency conversion technology is in the process of transforming from speed governing to energy conservation. In future, most low and medium-voltage inverters will be replaced by those that have conducted automated transformation or the imported ones, and Chinese enterprises will focus on the development of control and drive technologies. It is predicted that during 2014-2016 the Chinese low and medium-voltage inverter market will keep an AAGR of around 9%, and the market size is expected to reach approximately RMB30 billion by 2016.

China Low and Medium-voltage Inverter Industry Report, 2013-2016, released by ResearchInChina, mainly focuses on the followings:

- ✘ Development environment of low and medium-voltage inverters in China (including industry, policy and technology environment), etc.;
- ✘ The market size of low and medium-voltage inverters in China as well as prediction, competition pattern and supply and demand analysis in the coming 3 years;
- ✘ The application and market analysis of China's low and medium-voltage inverters in the downstream sectors, including hoisting machinery, elevator, machine tool industries;
- ✘ Operation of 16 key low and medium-voltage inverter manufacturers in China (including ABB, Siemens, Schneider Electric, INVT as well as Inovance Technology) and analysis on their low and medium-voltage inverter business.



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