



China Uninterruptible Power System (UPS) Industry Report, 2014-2017

Nov. 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.

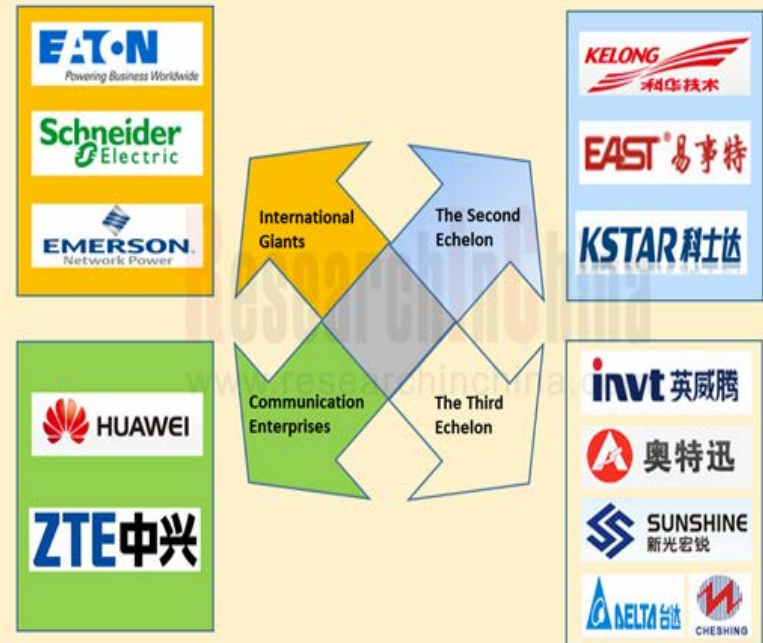
Abstract

An uninterruptible power system (UPS) is a power electronic apparatus that has energy storage equipment, consists mainly of inverter, rectifier and battery pack, and provides safe, stable and uninterrupted electric energy to load equipment.

As indispensable infrastructure for world's economic development, UPS is finding expanded application scope along with ever-accelerating informatization. Global UPS market sales for 2014 is estimated to reach USD 6.3 billion, up 3.3% year on year, and the figure in China will rise by 6.7% from a year earlier to USD 660 million (based on 1 USD=6.1 yuan). Burgeoning industries like big data, smart city, Internet of Things, 4G and rail transit will become new growth engines of UPS market. It is expected that the Chinese UPS market sales will exceed USD 820 million by 2017.

The downstream of the Chinese UPS market is concentrated in fields of finance, telecommunications, government, manufacturing and transportation, etc, which together account for about 80% of the Chinese UPS market revenue. High-power (>10kVA) UPS are high-end products in the industry, which made up only 20% of total sales volume but 85% of total sales value in China in 2013. As the construction of large big data centers progresses and high-power UPS products become more profitable, the Chinese high-power UPS market will maintain a fairly high growth rate in the future.

Major UPS Manufacturers in China by Grade Level



Sources: China Uninterruptible Power System (UPS) Industry Report, 2014-2017; ResearchInChina

At present, nearly all world's well-known UPS brands have entered the Chinese market. In 2013, Eaton, Schneider Electric and Emerson were the top three players in terms of UPS sales in China and occupied a combined 55% market share. Being the first echelon in the Chinese UPS market, the three companies focus on high-power high-end UPS products.

Local companies, represented by Xiamen Kehua Hengsheng Co., Ltd., Shenzhen Kstar Science & Technology Co., Ltd. and Guangdong East Power Co., Ltd, form the second echelon, of which Xiamen Kehua Hengsheng holds the highest market share, coming to 12% in 2013 and ranking the third in the Chinese high-power UPS market in 2013 with a market share of 20%, after Emerson and Schneider Electric.

China Uninterruptible Power System (UPS) Industry Report, 2014-2017 by ResearchInChina focuses on the following:

- ⇒ Development environment, industry barriers and trend forecast of China UPS industry;
- ⇒ Market size, competitive landscape, import & export, downstream markets like information equipment UPS and industrial power UPS of China UPS industry;
- ⇒ Operation and UPS business of 16 major global and Chinese UPS manufacturers (Emerson, Schneider Electric, Xiamen Kehua Hengsheng, Kstar and East).

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