



# Global and China High-Voltage Inverter Industry Report, 2014-2018

May 2015

## 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

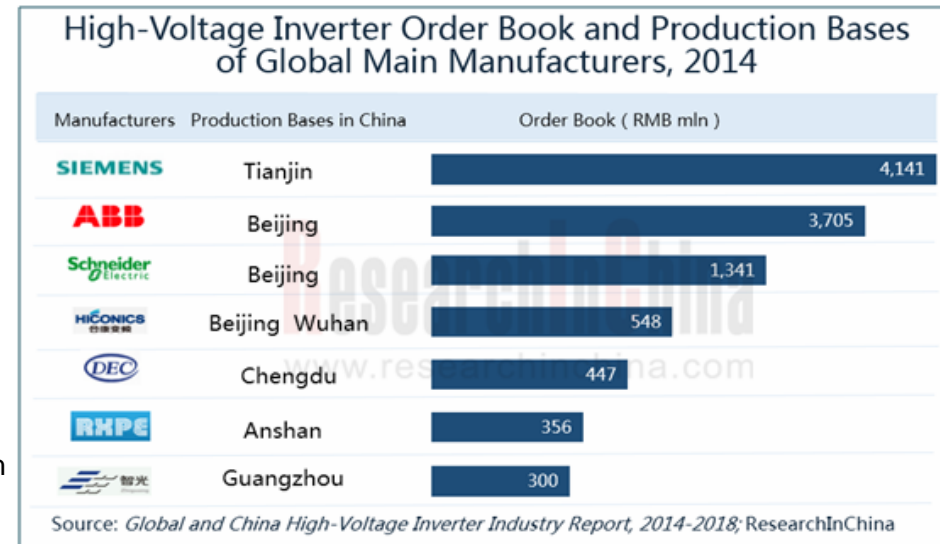
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

An inverter is a device that makes motors operate at variable speed. Customarily, China defines an inverter driving a AC motor with a rated voltage of 3-10kV as a high-voltage inverter. The frequency control system consisting of high-voltage inverters and high-power & high-voltage motors can realize the goals of speed adjustment, energy saving (typically 30%-60% energy is saved) and soft start.

As the demand for energy saving and environmental protection increases and the equipment upgrading speeds up, China's high-voltage inverter industry has achieved steady growth, and the market size jumped from RMB1.1 billion in 2005 to RMB7.7 billion in 2014, with the CAGR of 24.1%.

In future, China will prioritize the development of high-voltage inverters in order to ensure energy security, improve energy utilization and solve the haze problem. In 2015-2018, China's high-voltage inverter market size is expected to grow at 15% or above.



Currently, high-voltage inverters are used in fans, pumps, compressors, rolling mills and other equipment. Especially, fans and pumps are key consumption areas of high-voltage inverters in China and utilized 67% of such inverters in 2014, followed by compressors with 7%; the remaining 26% was applied to metallurgy, steel rolling, mine hoists, belt transmission, ship propulsion and other professional loads.

High-voltage inverters can be divided into general-purpose and high-performance ones. More than 80% shares of the general-purpose high-voltage inverter market is held by domestic enterprises such as Hiconics Drive Technology and Guangzhou Zhiguang Electric; while the high-performance high-voltage inverter market is mostly dominated by Siemens, ABB, Rockwell and other foreign companies. Because high-performance high-voltage inverters trigger higher gross margin than general-purpose ones by 50%, domestic Chinese enterprises will give priority to the R & D and production of high-performance high-voltage inverters in the future.

**Siemens:** The world's largest high-voltage inverter manufacturer entered the Chinese market in 1872. In FY2014, it achieved the revenue of EUR6.44 billion in China, accounting for 8.9% of its global revenue. In January 2015, Siemens launched SINAMICS G120C inverter with the rated power of 0.55kw-18.5kw, which can save the space by 30% and raise energy density by 40% compared with conventional inverters.

**Rockwell:** It stepped in the Chinese market in 1988 and has set up an R & D center, three production bases and 37 sales bases there. In April 2015, the company cooperated with SANY Heavy Equipment Co., Ltd to develop mine-use high-voltage explosion-proof inverters jointly to further expand the application of its products in the coal field.

**Hiconics Drive Technology:** China's largest local high-voltage inverter manufacturer has set up its high-voltage inverter production bases in Beijing and Wuhan. It sold 909 high-voltage inverters in 2014, so that the cumulative sales volume exceeded 10,000.

**Beijing Leader & Harvest Electric Technologies:** It is a leader in China in terms of high-power frequency conversion technology. In 2011, it was wholly acquired by Schneider. In 2014, its high-voltage inverter sales volume broke 11,000 cumulatively.

The report focuses on the following:

- Size, competitive landscape, etc. of the global high-voltage inverter market;
- Environments, policies, technology and the like of China high-voltage inverter industry;
- Size, supply and demand, prospect, price and so forth of Chinese high-voltage inverter market;
- Operation and layout in China of five foreign high-voltage inverter manufacturers;
- Operation, revenue structure and high-voltage inverter business of nine Chinese high-voltage inverter manufacturers.

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