



Global and China Elevator Industry Report, 2015

Jun. 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

The Chinese elevator market has been characterized by the followings since 2014:

New elevator output sustained growth momentum but at a slower pace. In 2014, China's elevator output exceeded 700,000 sets, up about 12% from a year ago, compared with a year-on-year growth rate of 18% in 2013. In spite of some impact on elevator market caused by the country's macro-control on real property, the implementation of new-style urbanization policies, large-scale construction of indemnificatory housing and rapid development of public transportation in medium and large cities in China slowed the decline of elevator sales in commercial housing market to a certain extent.

As domestic elevator companies accelerated their presence in service (repair & maintenance) business, the share of service revenue continued to rise. Competition in domestic elevator industry is now shifting from technology and sales to network and follow-up services. This can be confirmed by elevator companies' proportion of service revenue. Shenyang Brilliant Elevator finds the highest share, reaching 20.1% in 2014 compared with merely 9.1% in 2010; Canny Elevator raised the proportion from 3.7% in 2010 to 8.5% in 2014, and had established 32 branch companies by the end of 2014, 22 of which had obtained the qualification for elevator service.

Layout of Domestic Chinese Elevator Companies in Other Fields

Company	Extension	Event
Shanghai Mechanical & Electrical Industry	Intelligent equipment	On Feb 12, 2015, the company announced that it would establish, together with Japanese Nabtesco Corporation, Nabtesco (China) Precision Equipment Co., Ltd. for the manufacturing of precision reducers for robot with planned annual capacity of 200,000 units. The joint venture is expected to start operation in Jan 2016.
Guangzhou Guangri Stock	Intelligent equipment	On Apr 29, 2015, the company announced that it acquired 40% stake in Guangzhou Songxing Electrical for RMB120 million. The latter has obvious advantage in technology for and operation of intelligent welding and robot system integration.
Canny Elevator	Intelligent equipment	On Dec 30, 2014, the company announced it invested an addition of RMB53.30 million in cash to buy shares in UNISROBO, and it held total 40% stakes of the latter.
Shenyang Brilliant Elevator	Intelligent equipment, environmental protection equipment	On Jan 15, 2015, the company announced a private placement of no more than RMB543 million, of which RMB185 million would be used to purchase 100% stake in Yuanda Environment Engineering, RMB103 million to buy "intelligent grinding robot technologies", RMB20 million for capital increase in Yuanda Environment Engineering, and RMB95.35 million for construction of "intelligent grinding robot system construction project".
SJEC Corporation	3D printing	In 2014, the company's R&D team succeeded in trial-producing FDM desktop 3D printer, which has entered the stage of mass production, and meanwhile conducted research into cutting-edge technologies such as SLA (stereolithography) industrial 3D printer, SLS (selective laser sintering) and SLM (selective laser melting).

Source: Aforementioned Companies, ResearchInChina

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Elevator exports increased continuously. Domestic elevator companies will benefit from the strategy of “One Belt and One Road”, further expanding export scale. China’s export of elevators and escalators amounted to 68,900 sets in 2014, presenting a CAGR of 13.1% during 2007-2014. The figures for the first quarter of 2015 were 16,793 sets, up 12.91% from a year ago.

Since 2014, while consolidating their primary businesses, Chinese elevator companies have been extending to robot/intelligent equipment/industry 4.0 fields.

Global and China Elevator Industry Report, 2015 highlights the followings:

- ✘ Market size, new elevator sales volume, service market, competitive landscape and development mode of global elevator industry;
 - ✘ Competitive landscape of China elevator industry, including business layout of foreign brands in China and competition between foreign and domestic brands;
 - ✘ Supply structure, new elevator output and service market of China elevator industry;
 - ✘ Demand structure, demand and main influencing factors of China elevator industry;
 - ✘ Value, volume and prices of imported and exported elevators in China;
 - ✘ Product output and sales volume, operation, main projects and orders of 7 global and 8 Chinese elevator manufacturers;
- Development trend, output and export volume forecast of China elevator industry.

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