

China Rail Transit Air-conditioner Industry Report, 2016-2020

Oct. 2016

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

China's rail transit industry has boomed during the 12th Five-Year Plan period (2011-2015) with railway fixed-asset investment amounting to RMB3.58 trillion, a 47.3% surge over the 11th Five-Year Plan period. The country's railway mileage expanded from 91,200km in 2010 to 121,000km (including 19,000km high-speed railway) in 2015. Meanwhile, urban rail transit construction has been in full swing, with 111 urban rail transit lines (a total length of 3,286km) in 25 Chinese cities built and put into service by the end of 2015. All these have fueled the rapid development of rail transit vehicle industry.

In 2015, operational urban rail transit vehicles totaled 19,941 units and 48,165 standardized units, a 15.3% gain for each; high-speed CRHs (electric multiple units) were 21,000 units (cars) with CRH ownership density standing at 1.1 car/km or so, a marked growth compared with 0.75 in 2013. A rise in operational rail transit vehicles, accordingly, stimulates the purchase of rail transit vehicle air-conditioners. RMB5.389 billion was spent on buying rail transit vehicle air-conditioners in 2015, representing an increase of 5.6% from RMB5.105 billion in 2014.

According to the Medium- and Long-term Railway Network Plan issued by the State Council, China will invest no less than RMB2.8 trillion to build over 23,000km new railways during 2016-2020, upsizing railway network to 150,000km (30,000km high-speed railway) and covering more than 80% of large cities by 2020. Moreover, major cities scales up their investment in urban rail transit, adding an estimated traffic mileage of 900km annually during 2016-2020, twice the new ones in 2015, thus contributing an upsurge in rail transit vehicles delivered to newly-opened lines. As existing lines find an increasing frequency of departures, urban rail transit vehicle industry chain is bound to enjoy a period of explosive growth over the next couple of years.

Railway and urban rail transit air-conditioners are highly demanding on production qualification. Manufacturers must obtain product testing certificate and operation report before they enter the Chinese urban rail transit market. Shanghai Faiveley, Shijiazhuang King Transportation Equipment, and Guangzhou Zhongche Railway Vehicles Equipment Joint-Stock Co., Ltd. are the three locomotive and vehicle air-conditioner manufacturers designated by China Railway Corporation and also major manufacturers of rail transit air-conditioners in China.

Rail Transit Vehicle Air-conditioner Purchases in China by Market Segment, 2014-2015



Source: China Rail Transit Vehicle Air-conditioner Industry Report

Oct 2016

Unit: RMB100mln

Shijiazhuang King Transportation Equipment Co., Ltd. produces about 12,000 sets of rail transit air conditioning units annually. The company has set its foot in high-speed rail, railway coach, locomotive and urban rail transit. EU651 and EU691 have been used in 200/300/350km/h CRH2 CRH.

Guangzhou Zhongche Railway Vehicles Equipment Joint-Stock Co., Ltd. boasts annual capacity of around 8,000 sets. The company was acquired by Beijing Dinghan Technology in 2015 with the latter's Jiangmen-based 4,000 set/a project expected to go into production in 2016.

Shanghai Faiveley is primarily engaged in the production of urban rail and railway coach air-conditioning units with annual capacity of about 6,500 sets.

China Rail Transit Vehicle Air-conditioner Industry Report, 2016-2020 focuses on the following:

- ⇒ Overview of rail transit vehicle air-conditioner industry in China (definition & classification, industry policies, development trends, etc.);
- ⇒ Rail transit industry in China (railway, high-speed rail, urban rail transit, etc.)
- ⇒ Rail transit vehicle industry in China (locomotive, CRH, urban rail transit vehicle, etc.);
- ⇒ Rail transit vehicle air-conditioner industry in China (sales, demand, competitive landscape, and market forecasts, etc. in locomotive, railway coach, CRH, and urban rail transit vehicle industries);
- ⇒ 9 rail transit vehicle air-conditioner enterprises including Shijiazhuang King Transportation Equipment, Guangzhou Zhongche Railway Vehicles Equipment, New United Group, Shanghai Faiveley, Merak Jinxin Air Conditioning Systems (Wuxi), Songz Automobile Air Conditioning, Longertek Technology, Shanghai Cool-Air Transport Refrigeration Equipment, and Zhejiang Liebherr Zhongche Transportation Systems (profile, financial standing, products, R&D, latest developments, etc.)

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