



China Rail Transit Air-conditioner Industry Report, 2018-2022

June 2018

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

As Chinese cities are growing ever bigger and traffic jams are getting worse, the traditional public transport cannot meet city dwellers' mobility need any longer, and rail transit in consequence becomes indispensable to address heavy traffic congestion in big cities since it is characterized by high speed, large carrying capacity and less pollution. China has entered a fast development stage for rail transit and construction of high-speed rails, subways and intercity rails are either under way or in the pipeline across the country, stimulating rapid growth of related components like rail transit air-conditioners whose market size reported RMB5.025 billion in 2017 with a year-on-year surge of over 100%. It is anticipated that the investments into railways during 2016-2020 will be up to at least RMB4 trillion, that is to say, more than RMB800 billion per year, of which investment into rolling stock equipment is estimated to hit RMB540 billion. Additionally, the new urbanization development strategy is pushing ahead at a rapid race in China, and construction of urban rail transit becomes a development priority. As expected, the investments into urban rail transit will be more than RMB2 trillion between 2016 and 2020, including the estimated input of over RMB150 billion in rolling stock equipment. The Chinese rail transit air-conditioning market will be worth RMB23 billion in the next five years, i.e., an average of RMB4.6 billion per annum.

In China, the demand for rail transit air-conditioners comes mainly from railway locomotive driver's cab, passenger train, CRH, metro/light rail vehicle, etc., of which CRH and metro/light rail vehicle are and will be the key niche markets. In 2017, CRH air-conditioning market size approximated RMB1.87 billion, and metro/light rail vehicle air-conditioning market was worth RMB2.71 billion or so, both sweeping over 90% of total market size.

As far as competition is concerned, air-conditioners for railways and urban rail pose high requirements on production qualification, and manufacturers will be not allowed to enter Chinese urban rail transit market until they obtains product test certificate and operation report. Shanghai Faiveley, Shijiazhuang King Transportation Equipment and Guangzhou Dinghan Rail Transit Vehicle Equipment are the key producers of rail transit air-conditioner in China for the moment and designated by CHINA RAILWAY as the three suppliers of locomotive and vehicle air-conditioners. Elaborately, Shijiazhuang King Transportation Equipment boasts annual output of rail transit air-conditioning units up to 12,000 sets or so, with operations touching upon high-speed rail, passenger train, railway locomotive and urban rail. In particular, EU651 and EU691 products have been used on 200/300/350-km CRH2 trains; Guangzhou Dinghan Rail Transit Vehicle Equipment Co., Ltd is capable of producing about 12,000 sets; Shanghai Faiveley devotes itself to the production of air-conditioning units for urban rail and passenger trains, with annual production capacity standing at roughly 6,500 sets.

Rail Transit Air-conditioning Market Size in China, 2015-2022



Source: China Rail Transit Air-conditioner Industry Report, 2018-2022 June 2018

China Rail Transit Air-conditioner Industry Report, 2018-2022 highlights the followings:

- ◆ Overview of rail transit air-conditioning industry in China (definition, classification, policies, development trends, etc.);
- ◆ Analysis on rail transit industry in China (railways, high-speed rail, urban rail, etc.);
- ◆ Analysis on rail transit vehicle industry in China (locomotive, CRH, urban rail vehicle, etc.);
- ◆ Analysis on rail transit air-conditioner industry (sales, demand, competition and market forecast in railway locomotive, passenger train, CRH and urban rain vehicle);
- ◆ Nine rail transit vehicle air-conditioner enterprises (including Shijiazhuang King Transportation Equipment, Guangzhou Dinghan Rail Transit Vehicle Equipment, New United Group, Shanghai Faiveley, Merak Jinxin Air Conditioning Systems (Wuxi), Songz Automobile Air Conditioning, Longertek Technolog, Shanghai Cool-Air Transport Refrigeration Equipment, and Zhejiang Liebherr ZhongChe Transportation Systems), covering profile, finance, products, R&D, latest developments and so forth.

1. Status Quo of China's Rail Transit Air-Conditioning Industry

1.1 Definition and Classification

1.1.1 Air-conditioning Unit Series for Railway Coaches and Locomotives

1.1.2 Air-conditioning Unit Series for High-speed EMUs

1.1.3 Air-conditioning Unit Series for Urban Rail Vehicles

1.1.4 Air-conditioning Unit Series for Other Vehicles

1.2 Chinese Policies on Rail Transit Vehicle Air-Conditioning Industry

1.2.1 Industry Classification

1.2.2 Industry Supervision

1.2.3 Laws & Regulations

1.2.4 Industrial Policy

2. Development of China's Rail Transit Industry

2.1 Development of China's Railway Transportation

2.1.1 Status Quo of Railway Transportation

2.1.2 Dynamics of Railway Investment

2.1.3 Railway Network Scale

2.2 Development of High-Speed Rail in China

2.2.1 High-Speed Rail in Operation in China

2.2.2 High-Speed Rail Construction Plan

2.2.3 High-Speed Rail Investment News

2.2.4 Major High-Speed Rail Projects under Construction

2.3 Development of Urban Rail (Metro & Light Rail) in China

2.3.1 Urban Rail in Operation in Key Cities across China

2.3.2 Urban Rail Construction Plan in Key Cities across China

2.3.3 Urban Rail Investment News in Key Cities across China

2.3.4 Major Urban Rail Projects under Construction in Key Cities

3. Development of China's Rail Vehicle Industry

3.1 Locomotive

3.2 Urban Rail Transit Vehicles

3.3 High-speed Rail Vehicles

3.3.1 Market Demand for High-speed Rail Vehicles in China

3.3.2 Demand Forecast for High-speed Rail Trunk Line Vehicles in China

4. Situation of Rail Vehicle Air-Conditioning Market in China

4.1 Overall Market

4.1.1 Market Size

4.1.2 Competitive Landscape

4.1.3 Sales Comparison of Rail Transit Vehicle Air-conditioner Market

4.1.4 Manufacturing Capabilities of Major Enterprises

4.1.5 Customers Supported by Major Enterprises

4.2 Railway Transportation Air-Conditioning Market

4.2.1 Market Size

4.2.2 Demand Analysis

4.2.3 Demand Forecast

4.3 Urban Rail Vehicle Air-Conditioning Market

4.3.1 Market Size

4.3.2 Demand Analysis

4.3.3 Demand Forecast

5. Major Chinese Rail Transit Air-Conditioning Manufacturers

5.1 Shijiazhuang King Transportation Equipment Co., Ltd.

5.1.1 Profile

5.1.2 Product and Market Shares

5.1.3 Major Clients

5.1.4 Service Network	5.5.3 Operation
5.1.5 Operation	5.5.4 Competitive Edge
5.1.6 Competitive Edges	5.6 Songz Automobile Air Conditioning Co., Ltd.
5.1.7 Developments	5.6.1 Profile
5.2 Shanghai Faiveley	5.6.2 Operation
5.2.1 Profile	5.6.3 Revenue Structure
5.2.2 Products	5.6.4 Gross Margin
5.2.3 Operation	5.6.5 Main Rail Transit Air Conditioning Products
5.2.4 Competitive Edge	5.6.6 Output and Sales Volume
5.3 Guangzhou Dinghan Rail Transit Vehicle Equipment Co., Ltd.	5.6.7 Developments
5.3.1 Profile	5.7 Longertek Technology
5.3.2 Product and Market Shares	5.7.1 Profile
5.3.3 Operation	5.7.2 Main Products
5.3.4 Competitive Edge	5.7.3 Operation
5.3.5 Subsidiaries	5.7.4 Revenue Structure
5.3.6 Developments	5.7.5 Gross Margin
5.4 New United Group	5.7.6 Competitive Edge
5.4.1 Profile	5.7.7 Developments
5.4.2 Operation	5.8 Shanghai Cool-Air Transport Refrigeration Equipment Co., Ltd. (COOLTEK)
5.4.3 Revenue Structure	5.8.1 Profile
5.4.4 Gross Margin	5.8.2 Main Products
5.4.5 New United Air-conditioning System (Jiangsu)	5.8.3 Operation
5.4.6 Product and Market Shares	5.8.4 Competitive Edge
5.4.7 Production and Sales	5.9 Zhejiang Liebherr ZhongChe Transportation Systems Co., Ltd.
5.4.8 Competitive Edge	5.9.1 Profile
5.5 Merak Jinxin Air Conditioning Systems (Wuxi) Co., Ltd.	5.9.2 Products
5.5.1 Profile	5.9.3 Operation
5.5.2 Main Products	5.9.4 Competitive Edge

- Air Conditioning Installation for Major EMUs in China
- Chinese Laws and Regulations on Rail Transit Industry
- Major Chinese Policies on Rail Transit Industry
- Total Railway Freight Volume in China, 2012-2017
- Total Railway Freight Turnover in China, 2012-2017
- Total Railway Passenger Transport Volume in China, 2012-2017
- Total Railway Passenger Turnover in China, 2012-2017
- Fixed-asset Investment in Railways in China, 2010-2017 (unit: RMB bn)
- Operating Mileage of Railways in China, 2010-2017
- Operating Mileage of New Railway Lines in China, 2010-2017 (unit: km)
- Mileage of Electrified Railways in China, 2010-2017
- Operating Mileage of High-speed Rail in China, 2013-2017 (unit: km)
- Routes for High-speed Rail Put into Operation in China in Early 2018
- Planning Map for High-speed Rail Lines in China, 2020
- List of Proposed Key Railway Construction Projects in China, 2018
- China's High-speed Rail Lines under Construction, 2018
- Chinese Cities Obtaining Approval of Constructing Urban Rail Transit, End of May 2018
- Operating Mileage of Urban Rail Transit in China, 2008-2017 (unit: km)
- Urban Rail/Metro Lines Put into Operation in All Chinese Cities as of the End of 2017
- Urban Rail/Metro Mileage Put into Operation in All Chinese Cities as of the End of 2017
- China's Urban Rail Transit Projects Involved in Three-Year Action Plan for Construction of Major Transportation Infrastructure Projects, 2016-2018
- Major First-tier Cities' 13th Five-Year Plan for Developing Urban Rail Transit
- Added Mileage of Urban Rail Transit in China, 2014-2022E
- China's Investment in Urban Rail Transit, 2012-2017

- Key Urban Rail Transit Projects under Construction, 2017-2018
- China's Locomotive Ownership, 2007-2017
- China's Locomotive Structure (by Ownership), 2007-2017
- China's Railway Locomotive Output, 2010-2017
- China's Subway Vehicle Ownership, 2010-2017
- China's Subway Vehicle Ownership, 2015-2022E
- High-speed Railway Vehicle Ownership Density in Major Countries
- Operating Mileage of and CRH Trains for High-speed Railways in China, 2015-2022E
- Newly Operated High-speed Rail Projects, 2017
- Cost Structure of Chinese CRHs, 2017
- Purchase Amount of Air-conditioners for Rail Transit Vehicles in China, 2017
- Market Share of Major Manufacturers of Air-conditioners for Rail Transit Vehicles in China, 2017
- CRH Parts Suppliers Obtaining CRCC Certification in China
- Sales Comparison among Chinese Rail Transit Vehicle Air-conditioner Enterprises, 2014-2017
- Comparison of Rail Transit Air-conditioner Sales Value among Major Chinese Manufacturers, 2014-2017
- Capacity Situation of Major Chinese Rail Transit Air-conditioner Manufacturers, 2017
- Major Domestic Rail Transit Air-conditioner Manufacturers and Their Partners
- Railway Vehicle Tenders and Corresponding Air-conditioning System Market Size in China, 2014-2017
- Railway Locomotive Tenders and Corresponding Air-conditioner Demand in China, 2014-2017
- Railway Passenger Train Tenders and Corresponding Air-conditioner Demand in China, 2014-2017
- China's Demand for CRH Air-conditioner, 2014-2015
- China's Demand for Railway Vehicle Air-conditioner, 2016-2020E
- Urban Rail Transit Vehicle Tenders and Corresponding Air-conditioning System Market Size in China, 2014-2017
- Urban Rail Transit Vehicle Tenders and Corresponding Air-conditioner Demand in China, 2014-2017
- Newly Added Mileage of Urban Rail in China, 2011-2017

- Number of China's Newly Added Urban Rail Vehicles, 2010-2026
- China's Demand for Urban Rail Transit Vehicles (Excluding Tramcars), 2013-2022E
- China's Demand for Rail Transit Vehicle Air-conditioner, 2018-2022E
- Models and Application of Air-conditioning Products for Main Rail Transit Vehicles of Shijiazhuang King Transportation Equipment
- List of Air-conditioning for Light Railway of Shijiazhuang King Transportation Equipment
- Performance Index of Air-conditioning Units for Subway Vehicle Compartment of Shijiazhuang King Transportation Equipment
- Air-conditioning Units for Subway Vehicle Driver's Cab of Shijiazhuang King Transportation Equipment
- Performance Index of Air-conditioning Units for Railway Coaches of Shijiazhuang King Transportation Equipment
- Performance Index of Air-conditioning Units for Locomotive Driver's Cab of Shijiazhuang King Transportation Equipment
- Performance Index of Air-conditioning Units for High-speed Trains of Shijiazhuang King Transportation Equipment
- Performance Index of Air-conditioning Units for Other Vehicles of Shijiazhuang King Transportation Equipment
- Major Domestic and Foreign Clients of Shijiazhuang King Transportation Equipment
- Domestic Service Centers of Shijiazhuang King Transportation Equipment
- Overseas Service Centers of Shijiazhuang King Transportation Equipment
- Gross Industrial Output Value and Sales Value of Shijiazhuang King Transportation Equipment, 2014-2017
- Main Product Applications of Shanghai Faiveley
- Rail Transit Air Conditioning Diagram of Shanghai Faiveley
- Gross Industrial Output Value and Sales Value of Shanghai Faiveley, 2014-2015
- Energy Saving Advantages of Faiveley's Rail Transit Air Conditioning
- ZRJC's Air Conditioning Units for Railway Coaches
- ZRJC's Air Conditioning Units for Railway Coaches (Double-deck)
- ZRJC's Split-type Air-conditioning Units for Railway Coaches
- ZRJC's Locomotive Air-conditioning Units
- ZRJC's Air-conditioning Units for Urban Rail Vehicles
- ZRJC's Air-conditioning Units for Qinghai-Tibet Railway Vehicles

- ZRJC's Air-conditioning Units for Railway Air-conditioned Power Generator Cars and Baggage Cars
- ZRJC's Gross Industrial Output Value and Sales Value, 2014-2017
- ZRJC's Major Holding Subsidiaries
- Revenue and Net Income of New United Group, 2011-2017 (RMB mln)
- Air-conditioning Revenue and Gross Margin of New United Group, 2011-2016
- Major Train Air-conditioning Products of New United Group
- Output and Sales Volume of New United Group's Rail Transit Products, 2014-2017
- New United Group's Rail Transit Air-conditioner Orders, 2016-2017
- New United Group's Air-conditioning Equipment Capacity, Output, and Sales Volume, 2013-2016
- New United Group's Partners
- Merak's Products (Partial)
- Merak Jinxin Air's Results List
- Merak Jinxin Air's Revenue, Total Profit & Net Income, 2014-2017
- Number of Employees of Songz, 2010-2017
- Songz's Revenue and Net Income, 2010-2018
- Songz's Revenue Structure by Product, 2010-2017
- Songz's Revenue Structure by Region, 2010-2017
- Songz's Gross Margin by Product, 2010-2017
- Songz's Major Air-conditioning Equipment for Subway Vehicles
- Songz's Major Air-conditioning Equipment for Railway Coaches
- Songz's Railway Vehicle Air Conditioning Output, Sales Volume & Inventory, 2016-2017
- Longertek Technology's Major Urban Rail Transit Vehicle Air-conditioning
- Longertek Technology's General Air Conditioning Units for Major Locomotives
- Longertek Technology's Ultra-thin Air Conditioning Units for Major Locomotives
- Longertek Technology's SIEMENS DJ-1 Air Conditioning Units for Electric Locomotives

- Longertek Technology's Revenue and Net Income, 2014-2017
- Longertek Technology's Revenue Structure by Product, 2010-2017
- Longertek Technology's Revenue Structure by Region, 2014-2017
- Longertek Technology's Gross Margin by Product, 2014-2017
- Longertek Technology's Rail Transit Vehicle Air Conditioning Technology Roadmap and Features
- Longertek Technology's Rail Transit Vehicle Air Conditioning Technology Advantages
- COOLTEK's Major Urban Rail Transit Vehicle Air-conditioning
- COOLTEK's Gross Industrial Output Value and Sales Value, 2014-2015
- Revenue and Operating Costs of Zhejiang Liebherr Zhongche Transportation Systems, 2014-2017
- Liebherr's Rail Transit Vehicle Air Conditioning Circulation System Structure

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