

China Air Compressor Industry Report, 2014-2017

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Abstracts

In recent years, with steady growth of China's economy and sustained expansion of fixed-assets investment in equipment manufacturing industry, air compressor has been widely used in various industries like mining, metallurgy, power, electronics, machinery manufacturing, pharmaceutical, food, textiles & light industry and petrochemical. Air compressor industry is undergoing structural adjustment.

According to data of the China General Machinery Industry Association Compressor Sub-Association (CCA), the air compressor industry generated total industrial output value of RMB17.851 billion and operating revenue of RMB17.617 billion in 2013, both rising about 6.7% year on year, and registering CAGR of 8.2% and 8.1% during 2007-2013, respectively. It is expected that the downstream fields of air compressor will slow over the next several years and the Chinese air compressor industry is estimated to grow at an AAGR of 5.8% in 2014-2017 depending on development of downstream industries.

Air compressor consists mainly of screw air compressor and piston air compressor, with the former being more adaptive to future compressor development and gradually replacing the latter in many fields thanks to its significant advantages of low energy consumption, little noise and high reliability. Calculated by operating revenue, screw air compressor market was worth RMB13.1 billion in 2013, and is estimated to reach RMB17.2 billion by 2017.

At present, there are three types of competitors in China air compressor industry. The first type is multinational enterprises, represented by Atlas Copco, Ingersoll Rand, Sullair and Fusheng Group, which have strong independent R&D and design capabilities and take leadership in high-end screw air compressors. The second type is Chinese superior enterprises with significant R&D and design capabilities and high processing and manufacturing level, which are narrowing their gap with international

counterparts in terms of technological level and market share, including Zhejiang Kaishan Compressor Co., Ltd., Shanghai Hanbell Precise Machinery Co., Ltd. and Ningbo Baosi Energy Equipment Co., Ltd. The third is the ones that have no R&D capability for screw air compressor and specialize in low-end screw air compressor assembly and piston air compressor.

China Air Compressor Industry Report, 2014-2017 mainly focuses on the followings:

Overview of China air compressor industry, including development history, policies and regulations, market size, production and sales, competitive landscape, exports and development trend;

Main market segments of air compressor in China, covering market size and development prospects of screw air compressor and piston air compressor;

Analysis of 14 key Chinese and foreign manufacturers (Ingersoll Rand, Atlas Copco, Sullair, Fusheng, Kaishan Compressor, Hanbell Precise Machinery, Ningbo Baosi, Jiangsu Jin Tong Ling Fluid Machinery Technology Co., Ltd., Xi'an Shaangu Power Co., Ltd., Zhejiang Hongwuhuan Machinery Co., Ltd. and Wuxi Compressor Co., Ltd.), including profile, financial position, output and sales volume, main customers, hit products, R&D, manufacturing base distribution and technical characteristics.

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