

# China Inverter Industry Outlook Report, 2010-2015

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## Abstracts

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As the important composing equipment of industrial control system, inverters are installed at the front end of motors to regulate speed and save energy. According to different input voltage, inverters can be divided into low voltage (110V, 220V, 380V, etc.), medium voltage (690V, 1140V, 2300V, etc.), and high voltage (3kV, 3.3kV, 6kV, 6.6kV, 10kV, etc.).

Fueled by the implementation of national energy saving policy as well as the internal demand of energy consumption reduction by the industrial enterprises in recent years, Chinese high-voltage inverter and low & medium-voltage inverters have progressed rapidly with the respective growth rate over 37% and 15%. Up to 2009, the market size of high-voltage, medium-voltage, and low-voltage inverters in China had arrived at RMB3.9 billion, RMB1.6 billion, and RMB10.3 billion, up respectively 2.5 folds, 1.3 folds, and 0.6 fold against 2005.

During the 12th Five-Year Plan period, China will highlight 'manufacturing equipment upgrading' and 'industrial energy saving & environment protection' and adhere to the road of 'equal emphasis on speed control and energy saving', which will continuously pull the development of Chinese inverter industry. Promisingly, in 2015, the market size of high-voltage inverters in China will rise to RMB18 billion, and that of low and medium-voltage inverters will hit RMB30.1 billion, hereinto, medium-voltage ones enjoy RMB5.1 billion while low-voltage ones hold RMB25 billion.

Market Size of Inverter in China, 2005-2015E (Unit: RMB bn)

Source: INVT; ResearchInChina

High-voltage inverters fall into general type and high performance type. At present, domestic enterprises occupy more than 80% market share in general high-voltage inverter field, yet the high performance high-voltage inverter market is still dominated by such foreign enterprises as Siemens and ABB. In 2010, the capacity of general high-voltage inverter in China was sufficiently released, the product price dropped dramatically, and the enterprise profitability slid; it is anticipated that the market competition of general inverter will be relieved to some extent in 2011 along with the increasing reconstruction demand in downstream market. Meanwhile, the domestic enterprises led by Hiconics Drive Technology Co., Ltd. (Hiconics) and Rongxin Power Electronic Co., Ltd. have tapped into the field of high performance products, but it is possible for the industry to copy the import substitution process of general inverter owing to the high technical threshold of high performance inverter.

Different from high-voltage inverter, the low and medium-voltage inverter market has been invariably monopolized by foreign brands with the market share approximating 75%, including Japanese and European & American brands like Siemens, ABB, YASKAWA, Schneider Electric, and Fuji Electric. The most representative domestic brands cover Shenzhen INVT Electric Co., Ltd. (INVT), Shenzhen Inovance Technology Co., Ltd. (Inovance), Eura Drives Electric Co., Ltd. (Eura Drives), and Hope Senlan Science & Technology Corp., Ltd. (SLANVERT), with the total market share of 6.2% in 2009. INVT, an absolute leader in China's low and medium-voltage inverter market, has involved itself in the field of high-voltage inverter since 2008, successfully went public in 2010, and in the same year started the R&D and the sales of inverters for elevator, explosion proof, and rail transit. Inovance, with competitive advantages in elevator inverter market, stepped into the integrated motor and servo system business in 2010 by virtue of its excellent cost performance. In 2010, Eura Drives also initiated the expansion of inverter related products, setting foot in such product areas as servo, PLC, and soft starter as well as widening the coverage of product lines.

Apart from the emphasis on inverter market size, supply & demand, and competition pattern, this report probes into the key applications and development trend of high-voltage inverters and low & medium-voltage inverters, together with 19 key enterprises like Beijing Leader & Harvest Electric Technologies Co., Ltd., Hiconics, INVT, and Inovance.

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