

Global and China High-Voltage Inverter Industry Report, 2014-2018

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Abstracts

An inverter is a device that makes motors operate at variable speed. Customarily, China defines an inverter driving a AC motor with a rated voltage of 3-10kV as a high-voltage inverter. The frequency control system consisting of high-voltage inverters and high-power & high-voltage motors can realize the goals of speed adjustment, energy saving (typically 30%-60% energy is saved) and soft start.

As the demand for energy saving and environmental protection increases and the equipment upgrading speeds up, China's high-voltage inverter industry has achieved steady growth, and the market size jumped from RMB1.1 billion in 2005 to RMB7.7 billion in 2014, with the CAGR of 24.1%.

In future, China will prioritize the development of high-voltage inverters in order to ensure energy security, improve energy utilization and solve the haze problem. In 2015-2018, China's high-voltage inverter market size is expected to grow at 15% or above.

Currently, high-voltage inverters are used in fans, pumps, compressors, rolling mills and other equipment. Especially, fans and pumps are key consumption areas of high-voltage inverters in China and utilized 67% of such inverters in 2014, followed by compressors with 7%; the remaining 26% was applied to metallurgy, steel rolling, mine hoists, belt transmission, ship propulsion and other professional loads.

High-voltage inverters can be divided into general-purpose and high-performance ones. More than 80% shares of the general-purpose high-voltage inverter market is held by domestic enterprises such as Hiconics Drive Technology and Guangzhou Zhiguang Electric; while the high-performance high-voltage inverter market is mostly dominated

by Siemens, ABB, Rockwell and other foreign companies. Because high-performance high-voltage inverters trigger higher gross margin than general-purpose ones by 50%, domestic Chinese enterprises will give priority to the R & D and production of high-performance high-voltage inverters in the future.

Siemens: The world's largest high-voltage inverter manufacturer entered the Chinese market in 1872. In FY2014, it achieved the revenue of EUR6.44 billion in China, accounting for 8.9% of its global revenue. In January 2015, Siemens launched SINAMICS G120C inverter with the rated power of 0.55kw-18.5kw, which can save the space by 30% and raise energy density by 40% compared with conventional inverters.

Rockwell: It stepped in the Chinese market in 1988 and has set up an R & D center, three production bases and 37 sales bases there. In April 2015, the company cooperated with SANY Heavy Equipment Co., Ltd to develop mine-use high-voltage explosion-proof inverters jointly to further expand the application of its products in the coal field.

Hiconics Drive Technology: China's largest local high-voltage inverter manufacturer has set up its high-voltage inverter production bases in Beijing and Wuhan. It sold 909 high-voltage inverters in 2014, so that the cumulative sales volume exceeded 10, 000.

Beijing Leader & Harvest Electric Technologies: It is a leader in China in terms of high-power frequency conversion technology. In 2011, it was wholly acquired by Schneider. In 2014, its high-voltage inverter sales volume broke 11, 000 cumulatively.

The report focuses on the following:

Size, competitive landscape, etc. of the global high-voltage inverter market;

Environments, policies, technology and the like of China high-voltage inverter industry;

Size, supply and demand, prospect, price and so forth of Chinese high-voltage inverter market;

Operation and layout in China of five foreign high-voltage inverter manufacturers;

Operation, revenue structure and high-voltage inverter business of nine Chinese

high-voltage inverter manufacturers.

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