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Research Report of China's Medium-and-low-voltage Inverter Industry in 2009

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Abstracts

In the 1980s, the foreign funded inverters began to flow to Chinese market. With the rapid development of Chinese economy and the strong awareness of energy saving and environmental protection, the application of the inverters had been more and more popular and the scale had been enlarging quickly since the 1990s.

In 1993, the market scale of China's inverters did not reach 50 million USD, which arrived at 0.4 billion USD in 2000 and surpassed 2 billion USD in 2008. With the expansion of the market and diversification of clients' needs, the functions of China's domestic inverters are being improved and added. The integration level and the systematization are also intense and more and more convenient. Some inverters with exclusive usage have appeared. In addition, the fields of the inverter application are continuously increasing, from the production and processing equipment in the plant to air-conditioning, from heavy machinery to textile industry, from the electric motor with low power of 0.4 KW to one with large power of 900 KW. Furthermore, the evident economic benefits are achieved.

The strength of China's auxiliary industry of the inverter is relatively low. There is certain gap between domestic brands and foreign brands in the technology, processing and manufacturing, industrial design and capital. At present, the brand share of the foreign brands in the domestic inverter market is about 80%. The native inverter enterprises chiefly produce V/F control product. For those products like vector inverters with superior performance and high technology, most of the domestic enterprises haven't developed the mature products. Although a few outstandingly domestic funded brands such as Shenzhen INVT Electric Co, .Ltd. and Chengdu Hope Senlan have produced the inverters with high level compared with the same sorts. The species and specification of the products need to be enriched further compared with those

international giants.

In China's inverter market, the foreign funded brands are still dominant and the strength of the native excellent brands is being improved rapidly. Until the moment, there have been over 40 foreign funded brands in Chinese market. And hundreds of the domestic funded brands have emerged, whose manufacturers mainly concentrate in the coastal provinces like Guangdong, Shandong, Jiangsu and etc. Now the sale volume of the enterprises including Shenzhen INVT Electric Co., Ltd. , Chengdu Hope Senlan, Yantai Huifeng Electronics Co., LTD with the largest market share in the domestic funded brands has broken through 0.1 billion RMB. Shenzhen INVT and Chengdu Hope Senlan have promoted the vector products, of which the former owns not only the rich power specifications of the low-voltage vector products but also the mature medium-voltage vector products, whose completeness degree of the integrated product lines is near to the internationally top-notch brands.

The application of the medium and low-voltage inverters have been involved in many fields of the national economy, whose development is inevitably impacted by relevant downstream industries and the fields of application. The main fields of the application for the medium and low-voltage inverters in China include public engineering, municipal administration, coal, oil and gas exploration, petrochemical, plastic, textile and chemical fiber, food and beverage industry and so on.

As Japanese brands went into Chinese market in the early period of time, they are familiar with Chinese inverter market, promoting the inverters suitable for Chinese market appropriately by focusing on energy saving, low power and specialization. They stand out in the fields of energy saving and OME equipment. In the initial stage of the development, Japanese brands ruled Chinese inverter market. However, in recent years, the market share of Japanese brands has been nibbled by European and American brands and China's native brands. In 2008, the market share decreased to below 20%. The typical Japanese brands are Fuji, Mitsubishi and Yaskawa.

Taiwan brands entered to the mainland in the relatively early period of time, most of which bore Japanese brands. Now the typical Taiwan brands are Delta, Taian and Powtran.

LG-the Korean brand-occupies certain market share in China. Taiwan and Korea brands account for about 10% of the market share in China's medium and low-voltage inverter market.

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Although European and American brands enter to china's market late, they play an important role in Chinese inverter market due to the advanced control technology, high quality and friendly user interface. At present, most of the well-known European and American inverter brands go into China. The market share of low-voltage inverters has reached 40%, of which the typical brands are Swiss ABB, American AB (Rockwell), Denmark Danfoss, England EURO, France Schneider, Germany SIEMENS and Finland VACON. In particular, the market share of ABB and SIEMENS, two top-notch foreign funded brands, has surpassed other brands, with comprehensive strength difficult to keep pace with by other foreign funded brands.

At present, foreign funded brands still dominate in China's medium and low-voltage inverters. From the past years, the market share of European and American brands increases year by year. ABB and SIEMENS stand out especially. Attacked by European and American and domestic funded brands, the market share of Japanese brands decreases. However, as it goes into China's market early, it has a good market base, occupying the considerable market share. All typical brands possess strong competitiveness.

Facing the medium and low-voltage inverters market dominated by foreign funded brands, China's native brands also develop. Now the market share of domestic funded brands grows from 0 to 20%. The competition situation of European, American and Japanese brands with originally absolute advantage has changed. From the market share of China's medium and low-voltage inverters in 2008, the overall share of China's native brands has surpassed that of Taiwan and Korean brands, slightly higher than that of Japanese brands, becoming one of the chief forces in China's medium and low-voltage inverters market.

The readers can obtain the following and more information through this report.

-The current development of China's low-voltage inverter industry
-The market competition of China's low-voltage inverter industry
-The main foreign funded brands and their operations in China's low-voltage inverter industry
-The main native brands and their operations in China's low-voltage inverter industry
-Forecasting the development trends of China's low-voltage inverter industry

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