

Research Report on Chinese Electric Machinery Industry, 2010-2011

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Abstracts

The electric machinery industry is a major part of the electric industry. It consists of the electric generator and generator set sector, the electric motor sector and the micro motor sector. Electric machinery products are widely applied in the petroleum, chemical, metallurgy, electricity, urban construction and environmental protection industries. During 2001-2007, the average annual growth rate of Chinese electric machinery industry remained over 20%. In 2008, due to the international financial crisis, the growth rate of Chinese electric machinery industry declined; the market scale was about RMB 270 billion, rising by 16% YOY.

By November 2009, there were over 2,000 electric machinery enterprises in China. Though the quantity of enterprises is large, 90% of them are small and medium enterprises. Due to the numerous producers and high production, the price-cutting competition has formed to seize the market. The uneven qualities of products, price-cutting competition and meager profits become the major factors impacting the survival and development of the electric machinery enterprises. Chinese electric machinery industry is in urgent need of reintegration to eliminate inferior enterprises and retain competitive enterprises, which has become the development trend of Chinese electric machinery industry.

Most of the major products of Chinese electric machinery industry are positioned in the low-end market. These products are of low added value. The export advantages of Chinese electric machinery manufacture relying on the traditional cheap labor and domestic resources no longer exist. Speeding up the transformation of enterprises and propelling the industry integration are the absolute choice for the development of this industry. The global financial crisis drives away the low-price competition era of electric machinery. The prices of raw materials are uncertain with violent fluctuation at present,

acting against the cost control of small and medium electric machinery producers. Due to the deficiency of core competitiveness, many electric machinery enterprises suffer production reduction or even bankruptcy. The primary reason is that these enterprises lack the core competitiveness, namely, their own core products and technologies.

In recent years, a large number of electric machinery enterprises in China adopt the trade pattern of processing imported materials and processing & assembling of materials supplied by customers. They expand the export through fixed brand production model. Presently, the export to Hong Kong, South Korea, Japan, USA and EU, etc adopts this pattern. Nowadays, many foreign enterprises are also seeking various ways to get rid of the tough situation, including changing the line of production, switching to another business, carrying out partial OEM or relocating the production base, etc. They increase the technology cooperation and joint venture production with Chinese enterprises. Therefore, for Chinese electric machinery enterprises, especially the producers, there is high market potential. It is suitable for the production and export of Chinese enterprises. On the basis of rational and orderly development, exporters can acquire some profits.

The major problems of Chinese electric machinery export are the few categories, single structure, low price, long transaction period and poor appearance quality. In the electric machinery manufacture of EU's member states, the majority are small and medium enterprises. Their market position of high technology-content electric machinery is stable. On the one part they positively produce high-effectiveness electric machinery to save the energy; on the other part they add smart design on the same product. Their products with the same power as Chinese products possess better electric performance. Thus, their products display prominent superiority, effectively avoiding the competition with ordinary products. Chinese electric machinery export to USA mainly depends on foreign traders to produce in Chinese mainland the products sold well in USA market, including manufacture and processing of supplied materials, processing of supplied drawings and samples, fixed brand production.

Through this report, readers can acquire more information:

- Development environment of Chinese electric machinery industry
- Supply and demand of Chinese electric machinery industry
- Market competition of Chinese electric machinery industry
- Major enterprises in Chinese electric machinery industry and their operation
- Export of Chinese electric machinery industry
- Investment opportunities in Chinese electric machinery industry

-Prediction on the development trend of Chinese electric machinery industry

Following persons are recommended to buy this report:

- Generator and electric motor producers
- Generator and electric motor distributors
- Downstream enterprises of generator and electric motor
- Investors concerning Chinese electric machinery industry
- Research institutes concerning Chinese electric machinery industry
- Others concerning Chinese electric machinery industr

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