

Analysis Report on Chinese Converter Market

<https://marketpublishers.com/r/A91212586C6EN.html>

Date: December 2008

Pages: 23

Price: US\$ 550.00 (Single User License)

ID: A91212586C6EN

Abstracts

Executive summary:

Industry expanding

By 2007 China's converter market has reached a capacity of 11.6 billion RMB, a growth rate of 19% and is expected to reach 24.6 billion by 2011, maintaining a growth rate of around 20%.

Foreign brands dominating the market

80% of Chinese converter market is occupied by foreign brands, of which about 70% are European, American and Japanese brands. Whereas ABB and Siemens occupy an absolute leading position, the domestic brands occupy only 20% of the market share.

Domestic brands rapidly growing stronger

In recent years, a small number of outstanding domestic enterprises have emerged, which have certain competitive advantages in some segment markets, so that the competition pattern of the domestic converter market has changed, where the market share of the domestic enterprises increased from 15% in 2005 to 20% in 2006.

Industries in the upper stream having a great negative impact on the converter industry

As the domestic-funded enterprises rely mainly on imports for the core power device IGBT in the production of medium and low-voltage converter products since China is relatively backward in the field, converter manufacturers are at a disadvantage in bargaining and at some risk in purchasing IGBT devices.

Strong demand in the downstream industries

Medium and low-voltage converters are applied in a great many fields and are in strong demand, particularly among textile, chemical fiber, coal, oil and gas mining and metallurgical industry. And as users attach great importance to the quality of products and after-sales service, manufacturers that have a certain brand basis and a certain size of service network have more bargaining power.

Low-voltage converter into consolidation stage

Many of the products produced by the domestic enterprises are homogenous, which intensified price competition in the market. Small and medium-sized brands that do not have the scale advantages will be gradually phased out with the increased competition, then the industry will enter the consolidation stage and the market in the future will be more orderly.

Converter industry facing bright development prospects

Considering the advantages of the converters proper, the status quo and the potential of the industry as well as the good macro-economic environment, China's converter industry has very optimistic prospects. Insiders are generally of the view that China has potential market volume of about RMB 120-180 billion and over the next 10 years the market will not be saturated.

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