

China Screw Compressor Market Segmented By Type (Oil-injected Screw Compressors and Oil-Free Screw Compressors), By Stage (Single-Stage and Multi-Stage), By Technology (Stationary and Portable), By End-User Industry (Oil & Gas, Chemicals & Petrochemicals, Food & Beverage, Automotive, Power Plants, Mining & Metals and Others), By Region, and By Competition, 2018-2028

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Abstracts

China Screw Compressor Market has valued at USD 637.18 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.61% through 2028. China has undergone significant industrial expansion in recent decades, establishing itself as a global manufacturing powerhouse. The growth of industries such as automotive manufacturing, electronics, textiles, chemicals, and food and beverage has been particularly remarkable. These sectors heavily rely on compressed air systems, with screw compressors being a favored choice due to their efficiency and reliability. As industrial activities continue to expand, the demand for screw compressors to provide essential compressed air for various applications also increases.

Key Market Drivers

Industrial Growth and Expansion

China's screw compressor market is witnessing robust growth attributed to the country's rapid industrialization and expansion across diverse sectors. As China continues to establish itself as a global manufacturing hub, the demand for compressed air systems,

including screw compressors, has surged. Several factors contribute to this growth driver:

Firstly, the manufacturing sector in China has been experiencing exponential expansion. The 'Made in China 2025' initiative, which emphasizes innovation, high-tech industries, and automation, has resulted in increased production activities reliant on compressed air for various applications. From automotive manufacturing to electronics production, screw compressors are indispensable in providing a steady and dependable source of compressed air.

Secondly, the construction industry in China has witnessed remarkable growth fueled by urbanization and infrastructure development projects. Screw compressors play a pivotal role in construction equipment, powering tools such as jackhammers, pneumatic drills, and concrete mixers. As the construction sector continues to thrive, the demand for screw compressors is expected to further increase.

Additionally, the energy sector in China is undergoing significant transformation. The expansion of natural gas infrastructure, along with the development of wind and solar power projects, necessitates reliable compressed air systems for various processes, including gas compression, cleaning, and instrumentation. Screw compressors are well-suited to meet the stringent demands of the energy sector, thereby further driving market growth.

In conclusion, China's industrial growth and expansion, driven by initiatives like 'Made in China 2025,' the booming construction industry, and the evolving energy sector, are key factors contributing to the growing demand for screw compressors in the country.

Energy Efficiency and Environmental Concerns

Energy efficiency and environmental sustainability have emerged as crucial factors driving the Chinese screw compressor market. As China aims to reduce its carbon footprint and prioritize energy conservation, manufacturers of screw compressors have responded with innovative solutions. Here are the key drivers behind this trend:

Firstly, the Chinese government has implemented stringent energy efficiency standards and regulations to encourage the adoption of energy-efficient screw compressors. This has prompted industries to invest in advanced compressor technologies that are more energy-efficient, thereby fueling market growth. Variable frequency drive (VFD) screw compressors, in particular, have gained popularity due to their ability to adjust speed

according to varying air demand, resulting in reduced energy consumption.

Secondly, environmental concerns, including air quality and emissions reduction, have driven industries to transition from oil-lubricated to oil-free screw compressors. Oil-free screw compressors eliminate the risk of oil contamination in compressed air systems, making them ideal for applications in sectors such as pharmaceuticals, food and beverage, and electronics. These environmental considerations have significantly boosted the demand for oil-free screw compressors in China.

Furthermore, advancements in compressor technology have facilitated the development of screw compressors that utilize eco-friendly refrigerants instead of traditional hydrofluorocarbon (HFC) refrigerants. This transition addresses concerns related to greenhouse gas emissions and aligns with China's commitment to global environmental initiatives, further propelling market growth.

In conclusion, the emphasis on energy efficiency, compliance with environmental regulations, and the adoption of eco-friendly technologies are key drivers shaping the Chinese screw compressor market, showcasing the nation's dedication to sustainability.

Increasing Automation and Industry 4.0 Adoption

The rapid adoption of automation and Industry 4.0 practices in China's manufacturing and industrial sectors is a key driver behind the growth of the screw compressor market. Several factors contribute to this driver:

Firstly, Industry 4.0 emphasizes the integration of digital technologies, data analytics, and smart manufacturing. As Chinese industries embrace automation and digitalization, there is a surging demand for advanced screw compressors equipped with IoT capabilities and remote monitoring features. These smart compressors enable real-time performance tracking, predictive maintenance, and energy optimization, making them highly appealing to forward-thinking manufacturers.

Secondly, the growing trend of smart factories and the Industrial Internet of Things (IIoT) in China has increased the reliance on compressed air systems to power various automated processes. Screw compressors play a crucial role in providing the essential compressed air required for robotic operations, pneumatic controls, and automated assembly lines.

Furthermore, the rise of e-commerce and the logistics industry in China has resulted in

an increased demand for screw compressors in warehouse automation and material handling applications. These systems necessitate a reliable source of compressed air for tasks such as package sorting, conveyor belt operation, and pallet handling.

In summary, the integration of automation and Industry 4.0 practices in China's industrial landscape is a significant driver for the screw compressor market. The need for advanced, IoT-enabled compressors to support smart manufacturing and logistics operations has led to increased market demand and innovation in the sector.

Key Market Challenges

Intense Market Competition and Pricing Pressures

One of the significant challenges confronting the China Screw Compressor Market is the intense competition among both domestic and international manufacturers. With the growing demand for screw compressors, numerous companies have entered the market, resulting in a crowded and highly competitive landscape.

Domestic manufacturers in China have been rapidly expanding their production capacities and enhancing the quality of their products. This heightened competition has exerted pressure on prices, making it increasingly challenging for companies to maintain healthy profit margins. Many players are engaging in price wars to gain market share, which can lead to a downward spiral in terms of pricing and profitability.

International manufacturers also hold a significant presence in the Chinese market. They often bring advanced technologies and established brand reputations, creating difficulties for domestic manufacturers to compete on an equal footing. Additionally, international companies may benefit from favorable trade agreements or alliances, further complicating the competitive landscape.

Effectively navigating this competitive environment necessitates continuous innovation, cost control, and the ability to differentiate products based on quality, efficiency, and technology. Domestic manufacturers must also consider international market dynamics and adapt their strategies accordingly to remain competitive both domestically and globally.

Regulatory Compliance and Quality Assurance

China's regulatory landscape for industrial equipment has grown increasingly stringent,

posing challenges for manufacturers in the screw compressor market. Adhering to and maintaining compliance with evolving standards and regulations is crucial yet complex and costly.

For instance, China has implemented rigorous energy efficiency standards for industrial equipment, including screw compressors. Manufacturers must consistently update their products to meet these standards, necessitating significant investments in research and development. Failure to comply can result in penalties and restricted market access.

Ensuring stringent quality assurance is another vital aspect of the challenge. Building trust with customers and maintaining a strong reputation relies on meeting rigorous quality standards for screw compressors. However, achieving consistent quality in mass production can be demanding, especially for smaller manufacturers. Implementing robust quality control processes, adhering to international standards, and pursuing continuous improvement efforts are all essential but resource-intensive endeavors.

Moreover, export-oriented manufacturers in China must navigate international quality and safety standards to access global markets. Meeting diverse requirements across countries necessitates a complex and costly process of extensive testing, certification, and compliance efforts.

Overall, regulatory compliance and quality assurance pose significant challenges for the China Screw Compressor Market, requiring ongoing investments in technology and processes to ensure compliance and competitiveness.

Sustainability and Environmental Concerns

Sustainability and environmental concerns pose a growing challenge for the screw compressor market in China. As the nation grapples with environmental issues and strives to reduce its carbon footprint, manufacturers encounter several sustainability-related hurdles.

First and foremost, achieving higher energy efficiency in screw compressors is imperative. While there is a demand for energy-efficient compressors, developing and producing these machines can be a challenging task. Manufacturers must invest in research and development to design and manufacture compressors that meet or surpass energy efficiency standards, which can lead to increased production costs.

Secondly, there is an increasing preference for oil-free screw compressors in industries

such as pharmaceuticals, food and beverage, and electronics due to concerns about contamination and environmental impact. Developing reliable oil-free compressor technology that can meet the stringent requirements of these industries while remaining cost-effective can be a substantial challenge.

Additionally, the management of compressor waste, including the proper disposal of end-of-life compressors and the recycling of materials, presents environmental challenges. Ensuring that compressors are disposed of or recycled in an environmentally friendly manner can be a complex task that requires compliance with environmental regulations.

In conclusion, sustainability and environmental concerns are shaping the landscape of the China Screw Compressor Market, necessitating investments in cleaner technologies, waste management practices, and a commitment to reducing the industry's environmental footprint. Striking a balance between sustainability and economic viability remains a pressing challenge for manufacturers in the sector.

Key Market Trends

Shift Towards Energy-Efficient Screw Compressors

One notable trend in the China Screw Compressor Market is the increasing emphasis on energy efficiency. This trend is driven by various factors, including rising energy costs, environmental regulations, and a growing awareness of sustainability. Manufacturers are responding to these factors by developing and offering more energy-efficient screw compressors.

Energy efficiency is a crucial consideration for industries relying on compressed air systems, as energy consumption can significantly impact operational costs. To address this, manufacturers are introducing innovations such as variable frequency drive (VFD) technology. This technology enables compressors to adjust their speed and output to match specific air demand, thereby reducing energy wastage during low-demand periods.

Moreover, advancements in compressor design and materials are leading to improved efficiency. These advancements include the development of more aerodynamic rotor profiles, enhanced cooling systems, and precision manufacturing techniques. Consequently, modern screw compressors can deliver the same level of compressed air with lower energy consumption compared to older models.

Government initiatives and regulations aimed at promoting energy efficiency in industrial equipment are also driving this trend. China's commitment to reducing energy consumption and greenhouse gas emissions aligns with the push for more efficient screw compressors. As a result, manufacturers are increasingly focusing on research and development efforts to meet and exceed these energy efficiency standards.

Overall, the shift towards energy-efficient screw compressors is a prominent trend in the Chinese market. Businesses are seeking to reduce operating costs and minimize their environmental impact, driving the adoption of these more efficient solutions.

Adoption of Smart and Connected Screw Compressors

The adoption of smart and connected technologies in the China Screw Compressor Market is a notable trend. As industries throughout China embrace digital transformation and Industry 4.0 principles, the demand for screw compressors equipped with IoT (Internet of Things) capabilities and remote monitoring features is increasing.

Smart screw compressors enable real-time monitoring of compressor performance, energy consumption, and maintenance requirements. This data can be analyzed to optimize compressor operation, schedule predictive maintenance, and identify opportunities for energy savings. Manufacturers are progressively integrating sensors, cloud connectivity, and data analytics into their compressor systems to provide these capabilities.

Remote monitoring and control of screw compressors are particularly advantageous for industries with distributed operations, allowing for centralized management and prompt response to issues or faults. This trend is further accelerated by the need for enhanced efficiency and cost savings, as companies strive to minimize downtime and unplanned maintenance.

In addition to remote monitoring, the integration of artificial intelligence (AI) and machine learning into screw compressors is gaining momentum. AI can enhance compressor performance by continuously adjusting settings based on real-time data and historical patterns, ultimately improving overall efficiency.

The trend towards smart and connected screw compressors aligns with China's drive for increased automation and data-driven decision-making in its industries, making it a significant development in the market.

Segmental Insights

Type Insights

The Oil-injected Screw Compressors emerged as the dominant segment in 2022. Oil-injected screw compressors are extensively utilized across various industries due to their efficiency and reliability. In China, the oil-injected screw compressors segment holds significant importance, driven by the diverse industrial landscape of the country. It caters to a wide range of applications, including manufacturing, construction, automotive, and more. The market for oil-injected screw compressors has been steadily growing in response to industrial expansion and the increasing demand for compressed air in various sectors.

Oil-injected screw compressors serve as the backbone of many industries, providing a continuous and dependable source of compressed air. In the manufacturing sector, they power pneumatic tools, control systems, and production lines. The construction industry heavily relies on them for diverse applications, ranging from jackhammers to concrete mixers. Furthermore, industries such as petrochemicals, textiles, and food and beverage extensively utilize oil-injected screw compressors.

Energy efficiency plays a crucial role in driving the adoption of oil-injected screw compressors in China. These compressors have evolved to incorporate advanced technologies like variable frequency drives (VFDs) and precise control systems to match the air supply with demand. This results in reduced energy consumption and operating costs, aligning with China's focus on sustainability and cost-effectiveness.

The oil-injected screw compressors segment in China is highly competitive, with both domestic and international manufacturers vying for market share. Domestic companies often offer cost-effective solutions, while international players leverage their technological expertise and brand reputation. This competition fosters innovation and product development, providing customers with a wide range of options.

Stage Insights

The Multi-Stage segment is projected to experience rapid growth during the forecast period. Multi-stage screw compressors are frequently utilized in applications that necessitate compressed air at elevated pressures, rendering them indispensable in various industries. The market for multi-stage screw compressors in China is substantial

and continues to expand. These compressors find application in industries such as oil and gas, petrochemicals, mining, and power generation, where high-pressure compressed air or gas is indispensable. The demand for multi-stage screw compressors has been on the rise due to the expansion of these sectors.

Multi-stage screw compressors are particularly well-suited for applications that require compressed air or gas at high pressures. In the oil and gas industry, they are employed for natural gas processing, gas transportation, and enhanced oil recovery. In the petrochemical sector, multi-stage screw compressors play a pivotal role in processes such as hydrogen compression and gas recycling. The mining and power generation industries also rely on them for specialized applications.

Multi-stage screw compressors are renowned for their capability to generate higher pressures compared to single-stage compressors. They achieve this by compressing air or gas in multiple stages, making them suitable for applications demanding pressures exceeding what single-stage compressors can deliver. This capability is crucial in industries where high-pressure air or gas is vital for efficient operations.

The market for multi-stage screw compressors in China is highly competitive, with both domestic and international manufacturers vying for market share. Domestic manufacturers often possess an advantage in terms of cost-effectiveness, while international companies bring advanced technology and global expertise to the segment.

Regional Insights

East China emerged as the dominant region in the China Screw Compressor market in 2022, holding the largest market share. East China, encompassing provinces like Jiangsu, Zhejiang, Anhui, Fujian, Jiangxi, and Shandong, is renowned for its robust industrial base, economic progress, and manufacturing expertise. Serving as a prominent industrial hub in China, East China hosts a diverse range of industries including automotive manufacturing, electronics, petrochemicals, textiles, and more. This concentration of industries fuels substantial demand for screw compressors across various applications such as air tools, assembly lines, and pneumatic control systems. The region's industrial growth significantly drives the screw compressor market in East China.

East China has firmly established itself as a manufacturing and export-oriented region. The local manufacturers heavily rely on screw compressors to power their production

processes. Moreover, the products manufactured in East China are widely exported, necessitating reliable and efficient compressed air systems. This creates an opportunity for screw compressor manufacturers in the region to cater to the demand while exploring export prospects.

Similar to the rest of China, East China places increasing importance on energy efficiency and environmental sustainability. The emphasis on reducing energy consumption and emissions propels the demand for energy-efficient screw compressors in the region. Manufacturers in East China can leverage this trend by offering advanced compressor technologies that aid industrial users in meeting energy efficiency standards and reducing operational costs.

The East China region boasts technological innovation and research capabilities, presenting an opportunity for screw compressor manufacturers to collaborate with local research institutions and universities in developing cutting-edge compressor technologies. Advancements in areas such as variable frequency drive (VFD) technology, oil-free compressors, and smart compressor systems can find fertile ground for development in East China.

To summarize, East China's status as a major industrial and manufacturing hub, coupled with its emphasis on energy efficiency and environmental compliance, opens up significant opportunities for the screw compressor market. Manufacturers and investors should consider the region's distinctive characteristics and market dynamics while devising strategies for their presence and growth in East China's screw compressor market.

Key Market Players

Atlas Copco (China) Investment Co., Ltd.

Ingersoll Rand (China) Investment Co., Ltd.

Sullair (Shanghai) Co., Ltd.

Kaishan Compressor

Hanbell Precise Machinery Co., Ltd.

Fusheng Group

Hitachi Industrial Equipment (Shanghai) Co., Ltd.

Gardner Denver (Shanghai) Machinery Co., Ltd.

Elang Industrial (Shanghai) Co., Ltd.

Shanghai Feihe Industrial Group Co., Ltd.

Report Scope:

In this report, the China Screw Compressor Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

China Screw Compressor Market, By Type:

Oil-injected Screw Compressors

Oil-Free Screw Compressors

China Screw Compressor Market, By Type:

Single-Stage

Multi-Stage

China Screw Compressor Market, By Technology:

Stationary

Portable

China Screw Compressor Market, By End-User Industry:

Oil & Gas

Chemicals & Petrochemicals

Food & Beverage

Automotive

Power Plants

Mining & Metals

Others

China Screw Compressor Market, By Region:

East China

South-Central China

North China

South-West China

North-East China

North-West China

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the China Screw Compressor Market.

Available Customizations:

China Screw Compressor Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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