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Industrial Controls in China

Industry Study with Forecasts for **2015 & 2020**

Study #2817 | December 2011 | \$5400 | 248 pages

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Demand growth will be aided by further industrial control product development and technological advances in solid-state controls that will enable end users to improve their productivity.

Demand to rise 13.6% yearly through 2015

Demand for industrial controls in China is projected to rise 13.6 percent annually through 2015 to ¥259 billion. Gains will be supported by increases in durable goods output, as well as by expanding investment in key industries such as chemicals, utilities and construction. Demand growth will also be aided by continuing product development and technological advances in solid-state controls that will enable end users to improve their productivity. However, gains will be restrained by competition from personal computers programmed to perform control-related functions.

Shipments of industrial controls from facilities in China are projected to rise 13.4 percent annually through 2015 to ¥269 billion, with net exports expanding to ¥9.8 billion. Shipment growth will be fueled primarily by strong increases in domestic demand, although exports will also expand as Chinese products become more competitive in international markets.

Advanced controls to outpace conventional types

Demand for advanced control products is expected to continue to rise faster than demand for conventional controls, as the advanced types provide superior performance and production capabilities. As these products become more technologically intricate, demand for systems

Industrial Control Demand in China (259 billion yuan, 2015)



Advanced Controls Hardware 37%

Advanced Controls Services/Software 21%

General-Purpose Conventional Controls 23%

Special-Purpose Conventional Controls 19%

integration services and industrial control software will grow rapidly. Adjustable speed drive controls will remain the largest advanced industrial control product segment, primarily bolstered by the superior energy conservation performance they provide. Demand for special-purpose controls is expected to continue to outpace that for general-purpose products through 2015, benefiting from the application-specific nature of these devices that allows them to sell at higher prices than general-purpose controls.

Electrical/electronic equipment market to grow fastest

Durable goods industries accounted for

the largest share of demand in 2010, making up 78 percent of the total. Industrial controls are especially utilized by electrical and electronic equipment and machinery manufacturers. Original equipment manufacturer (OEM) applications are expected to provide better prospects for growth than maintenance/repair/operations (MRO) applications, benefiting from solid advances in durable goods manufacturing in China. Electrical and electronic equipment is expected to be the fastest growing market for industrial controls through 2015, supported by strong increases in manufacturing output, as well as rising use of control devices in electrical and electronic equipment.

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Sample Text, Table & Chart

CONVENTIONAL INDUSTRIAL CONTROLS

Supply & Demand

Demand for conventional industrial controls in China is expected to rise at a faster rate than general-purpose types through the forecast period, as their specialized nature makes them more valuable to end user, although general-purpose controls will continue to account for more than half of total conventional industrial control demand in 2015.

Shipments of conventional controls from Chinese facilities are also forecast to advance 13.3 percent per annum to ¥107.8 billion in 2015, matching the pace of demand growth. Gains in the Chinese conventional industrial control market have accompanied the development of an increasingly formidable domestic manufacturing industry. The development of the market, especially with respect to technological sophistication, owes much to investment on the part of major multinational companies.

Chinese conventional control producers will gain international market share due to their lower production costs and improving production technologies. Many multinational producers have relocated manufacturing plants to China to take advantage of low production costs compared with many developed countries, which will also support gain in conventional industry control exports. Still, Chinese conventional industrial control imports are expected to continue to rise, fueled by future expansion and manufacturing industry upgrade in China for technologically sophisticated products. Net exports will account for a small share of total shipments of conventional

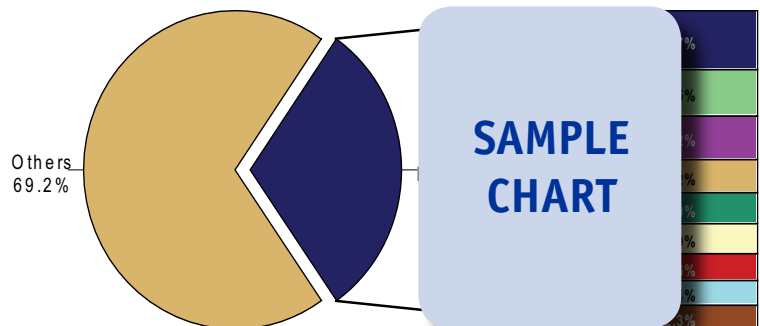
TABLE VI-4
MACHINERY INDUSTRIAL CONTROL DEMAND IN CHINA
 (million yuan)

Item	2000	2005	2010	2015	2020
Machinery Shipments (bil ¥) ¥ controls/000¥ machinery					
Machinery Industrial Control Demand					
Industrial Machinery					
Metalworking Machinery					
HVAC & Commercial Refrigeration					
Construction & Related Machinery					
Other					
% machinery controls					
Durable Goods Ind Control Demand					

SAMPLE TABLE

CHART VII-1

INDUSTRIAL CONTROL MARKET SHARE IN CHINA BY COMPANY
 (136.8 billion yuan, 2010)

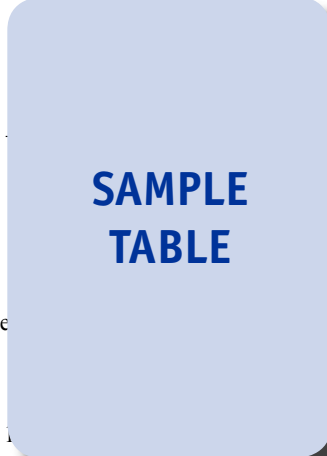


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-1
**ADVANCED INDUSTRIAL CONTROL
 SUPPLY & DEMAND IN CHINA**
 (million yuan)

Item	2000	2005	2010	2015	2020
Industry GFCF (bil ¥) ¥ controls/000¥ industry GFCF					
Advanced Industrial Control Demand					
Adjustable Speed Drive Controls					
Computer Numerical Controls					
Programmable Logic Controllers					
Proximity & Positioning Sensors					
Other Solid-State Controls					
Parts & Accessories					
Control Systems Integration Service					
Industrial Control Software					
+ net exports					
Advanced Ind Control Shipments					



COMPANY PROFILES

DELIXI Group Company Limited
 Delixi Industrial Park
 Yueqing, Zhejiang 325604
 China
 86-577-6...
 http://ww...

SAMPLE PROFILE

Sales: ¥... (company, 9/11)
 Employe...

Key Proc... (sensors, temperature-indicating... and low-voltage electric tra...

DELIXI Group is a privately held manufacturer of electric transmission and distribution equipment. The Company markets its products in more than 40 countries worldwide.

DELIXI Group was the third largest industrial control supplier in China in 2010, with a market share of 4.2 percent. The Company is involved in the Chinese industrial control industry through the manufacture of such general-purpose industrial controls as timing and overload relays, contactors, temperature-indicating controllers, and pushbutton and indicator switches. DELIXI Group's timing relays comprise super timing, super miniature and preset digital display counter types. A specific overload relay is the CDRE17 electronic model, which can be assembled with corresponding AC contactors to form starters. Among the Company's contactors is the CDC17 series AC variety that is capable of protecting circuits against overload or phase breaking. DELIXI Group makes temperature-indicating controllers in a range of types, including encoding setting, number-indicating thermoregulator;

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"Demand for adjustable speed drive controls is projected to increase 12.8 percent per year through 2015, reaching ¥40.0 billion. Advances will be bolstered by growing interest in the strong energy conservation performance adjustable speed drive controls provide. In addition, gains will be fueled by the enhanced capabilities that manufacturers will continue to incorporate into their products, including increased drive intelligence, improved communication options and open programming structure. Demand will also benefit from ..."
 --Section IV, pg. 42

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OTHER STUDIES

Machine Tools in China

Machine tool demand in China will rise 14.2 percent annually through 2014, bolstering the country's position as the largest machine tool consumer and producer. The dominant metal cutting machine segment will slightly outpace metal forming types. The transportation equipment market will grow the fastest. This study analyzes the 200 billion yuan machine tool industry in China, with forecasts for 2014 and 2019 by product, market and region. The study also evaluates company market share and profiles industry participants.

#2757 August 2011 \$5400

Advanced Lighting

US demand for advanced lighting is forecast to increase 9.3 percent per annum through 2015. A government-mandated phaseout of incandescent lamps and projected lower costs for advanced lighting will drive gains. Light emitting diodes (LEDs) will remain the fastest growing type and take market share from compact fluorescent lamps (CFLs) and halogen lamps. This study analyzes the \$7.2 billion US advanced lighting industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles industry players.

#2743 May 2011 \$4900

World Machine Tools

World demand for machine tool products is projected to increase 9.4 percent annually through 2014. The best prospects will be found in the developing world, especially China and India. The industrial sector will remain the largest market, but the transportation sector will post the strongest gains coming off a weak 2009. This study analyzes the \$77 billion world machine tool industry, with forecasts for 2014 and 2019 by type, market, world region and for 19 countries. The study also evaluates company market share and profiles industry competitors.

#2739 April 2011 \$5900

World Packaging Machinery

Global packaging machinery demand will rise 4.7 percent yearly through 2014, driven mainly by gains in developing nations. In developed areas, demand will rebound after a period of decline. Beverages will be the fastest growing market, while labeling and coding, and filling and form/fill/seal machines will be the fastest growing products. This study analyzes the \$28.6 billion world packaging machinery industry, with forecasts for 2014 and 2019 by product, market, world region and for 26 countries. It also evaluates company market share and profiles industry players.

#2727 February 2011 \$6100

Sensors

Demand for sensors in the US will rise 6.1 percent annually through 2014. The motor vehicle market will grow the fastest based on a rebound in motor vehicle production and the rising use of newer sensor-laden systems. Proximity and positioning and chemical property sensors will be the fastest growing types. This study analyzes the \$9.7 billion US sensors industry, with forecasts for 2014 and 2019 by product and market. The study also reviews sensor technology, evaluates company market share and profiles industry competitors.

#2662 September 2010 \$4900

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