

Generators

Industry Analysis Report

2012.07



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Focus Technology Co., Ltd

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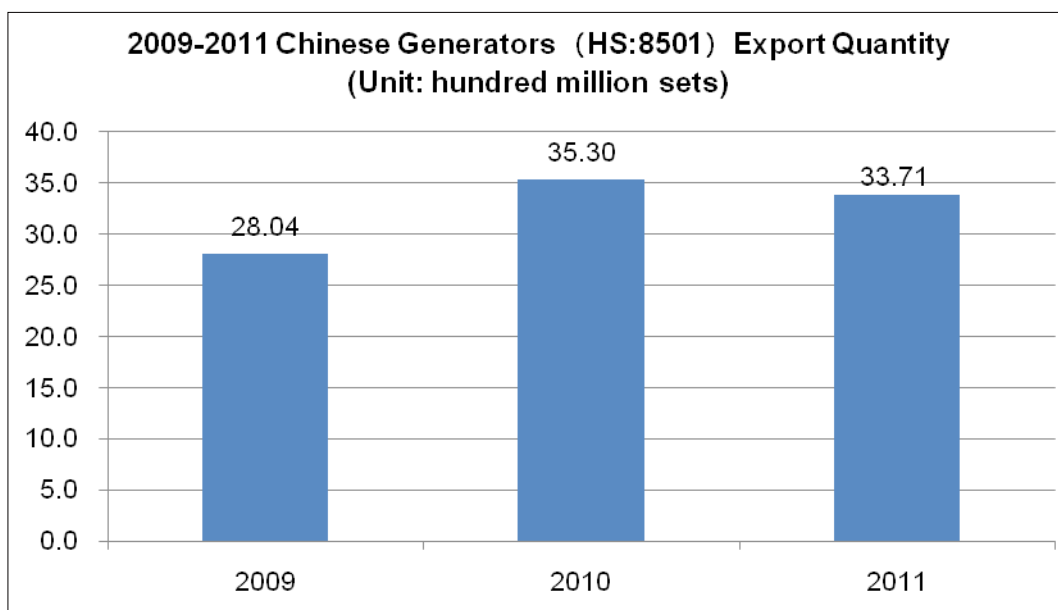
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Introduction:

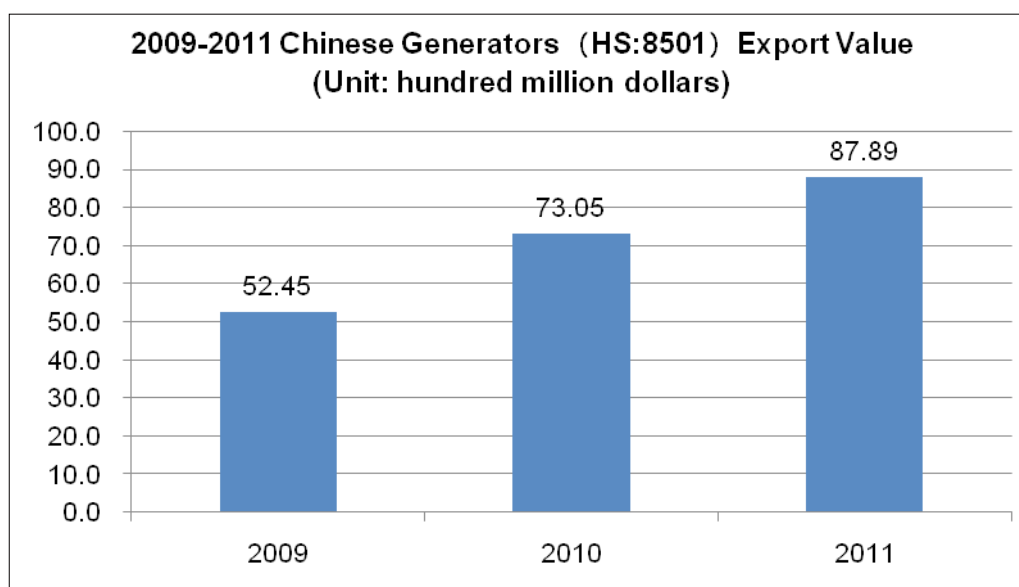
HS:8501, electric motors and generators (excluding generating sets), hereinafter referred to shortly as “generators”

1. Chinese Export Trends Analysis of Generators in 2009-2011

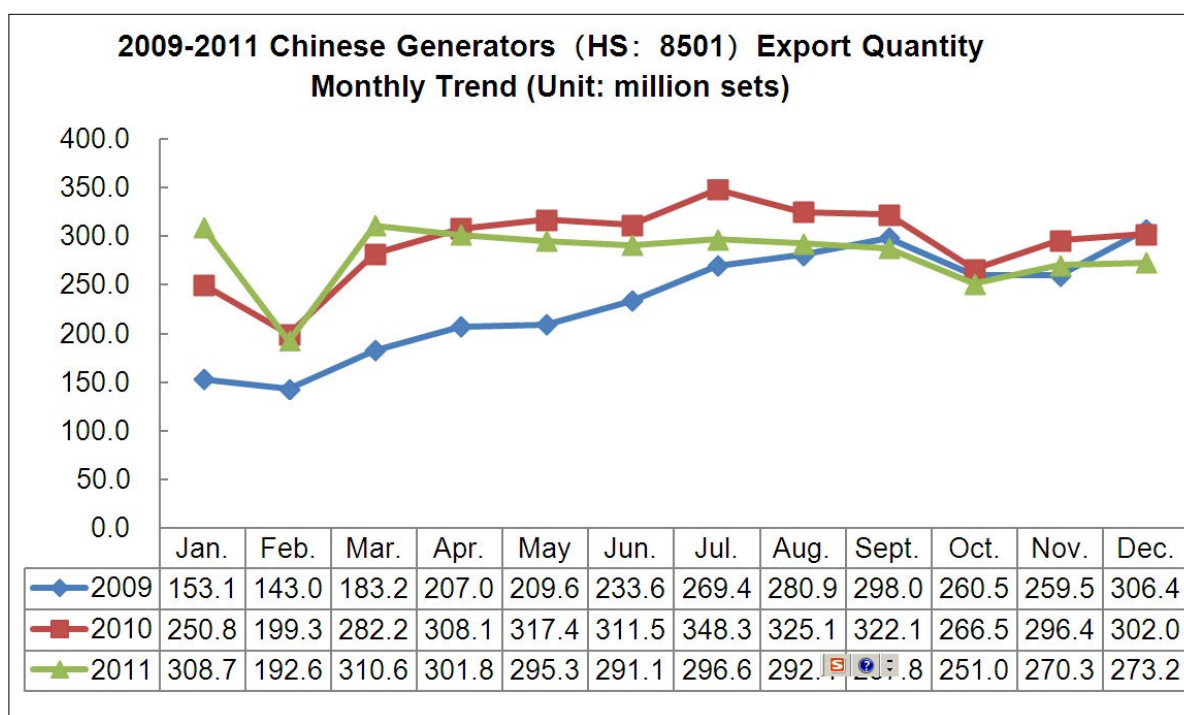
1.1. 2009-2011 Chinese Generators(HS:8501)Export Quantity Trends



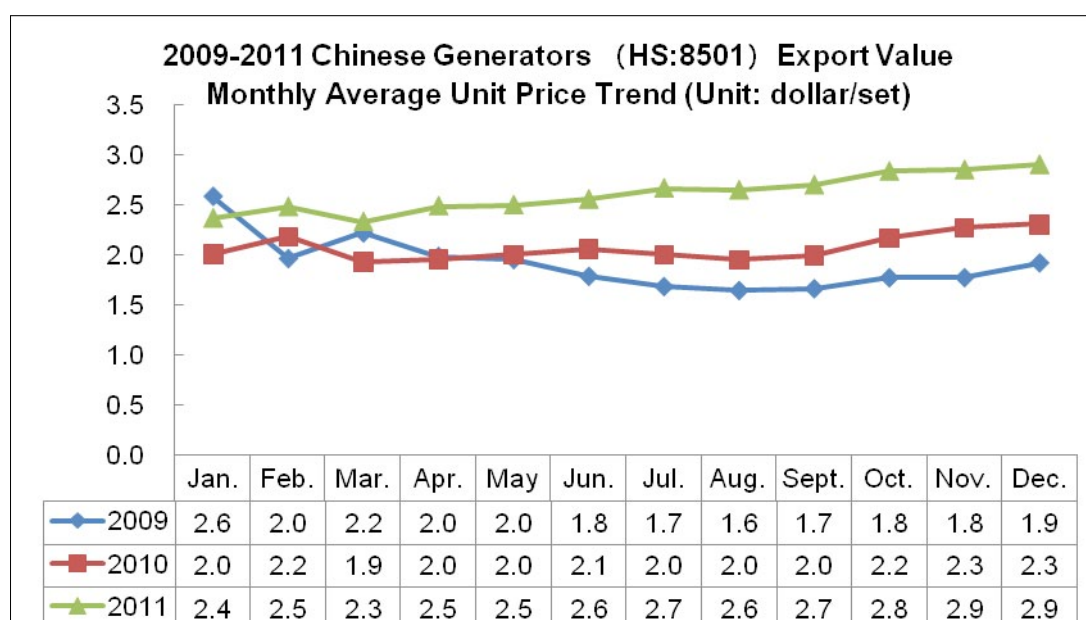
1.2. 2009-2011 Chinese Generators (HS:8501)Export Value Trends



1.3. 2009-2011 Chinese Generators (HS:8501) Export Quantity Monthly Trend



1.4. 2009-2011 Chinese Generators (HS:8501) Export Value Monthly Average Unit Price Trend



In 2011, the Chinese export Quantity of generators reached 3.371 billion sets, which increased by 20.2% than in 2009 but decreased by 4.5% than in 2010.

During the years of 2009-2011, the Chinese export value of generators keeps increasing. In 2011, the export value reached \$ 8,789 million, which respectively increased by 67.6% and 20.3% than in

2009 and in 2010. The number shows the trends were quite appreciable.

Meanwhile, the average unit price of Chinese generators keeps increasing, and it increased by 25.9% in 2011 than in 2010.

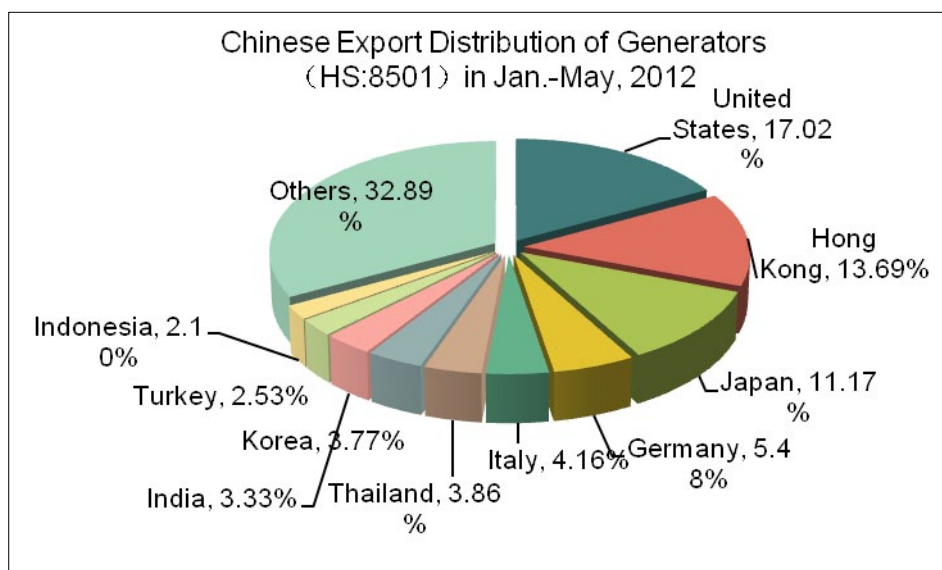
2. Chinese Export of Generators from in Jan. - May, 2012

2.1. Chinese Export Quantity and Value of Generators (HS:8501)in Jan. - May, 2012

Month	Quantity(hundred million sets)	Value(hundred million dollars)	Year-on-Year ±%	
			Quantity	Value
1	2.22	7.29	-28.2	-0.2
2	2.14	6.01	11.3	25.8
3	2.70	8.33	-13.2	14.9
4	2.55	8.04	-15.6	6.9
5	2.65	8.63	-10.1	16.9
Total	12.26	38.30	-13	11.9

2.2. Chinese Major Export Countries/Regions of Generators(HS:8501) in Jan. - May, 2012

No.	Countries/Regions	Total in Jan. - May,2012		Year-on-Year ±%	
		Quantity(set)	Value(thousand dollars)	Quantity	Value
1	USA	84,733,094	651,746.4	16.8	25.5
2	Hong Kong	581,218,941	524,522.3	-16.5	7.4
3	Japan	147,869,607	427,734.9	-4.1	15.1
4	Germany	50,472,387	210,077.7	-26.2	18.1
5	Italy	21,279,137	159,492.0	-11.6	-0.7
6	Thailand	25,600,123	147,901.3	-16.9	22.6
7	Republic of Korea	60,535,849	144,442.4	-10.8	2.3
8	India	10,119,980	127,638.6	-7.6	5.8
9	Turkey	13,015,939	96,788.5	-1.4	0.5
10	Indonesia	8,715,953	80,418.5	1.4	5.8
11	Malaysia	13,341,372	74,365.5	-27.9	0.3
12	United Kingdom	3,430,076	69,091.1	8.4	32
13	Brazil	15,596,329	66,600.3	-17.1	3.7
14	Mexico	19,565,000	65,524.7	-2.2	39.2
15	Spain	2,825,689	54,531.1	2.5	15.6
16	Canada	10,256,526	52,184.2	9.1	21.5
17	Russian Federation	3,472,255	49,972.4	-30.4	-3.2
18	France	5,063,045	48,195.8	-47.6	7.8
19	Poland	3,865,634	41,499.1	51.4	117.4
20	Netherlands	27,024,577	41,461.2	-18.4	-21.6



2.3. Chinese Major Export Sourcing Regions of Generators(HS:8501)in Jan. - May, 2012

NO.	Regions	Total in Jan. – May,2012		Year-on-Year ±%		Proportion (%)
		Quantity(set)	Value(thousand dollars)	Quantity	Value	
1	Guangdong	828,881,776	1,372,432.4	-17	10.7	35.83%
2	Zhejiang	84,317,548	714,918.2	0.5	16.5	18.66%
3	Jiangsu	84,841,359	668,701.2	44.2	19	17.46%
4	Shanghai	33,205,306	317,025.5	-43.6	-0.2	8.28%
5	Fujian	26,871,046	199,153.1	-11.1	-8	5.20%
6	Liaoning	116,903,959	160,077.7	-13.6	28	4.18%
7	Shandong	8,456,039	116,659.4	-16.1	21.8	3.05%
8	Tianjin	21,983,686	99,010.1	-0.3	16.6	2.58%
9	Hunan	5,850,770	37,854.2	44.4	28.5	0.99%
10	Hebei	404,264	32,177.5	-8	-12.6	0.84%
11	Beijing	130,804	16,354.7	-55.7	-27.8	0.43%
12	Sichuan	3,262	13,525.4	-13	258.1	0.35%
13	Anhui	1,933,683	12,274.1	424.8	45.8	0.32%
14	Jiangxi	1,351,653	11,690.2	18.3	79.4	0.31%
15	Henan	13,152	10,247.0	55.7	40.7	0.27%
16	Chongqing	1,071,064	9,903.7	-62.5	7.3	0.26%
17	Hubei	1,117,799	9,019.3	-16.8	-14.6	0.24%
18	Shanxi	95,463	7,031.1	1199.7	62.7	0.18%
19	Heilongjiang	373	5,697.5	-99.9	-47.4	0.15%
20	Guangxi	8,097,017	4,046.8	374242	1184.4	0.11%

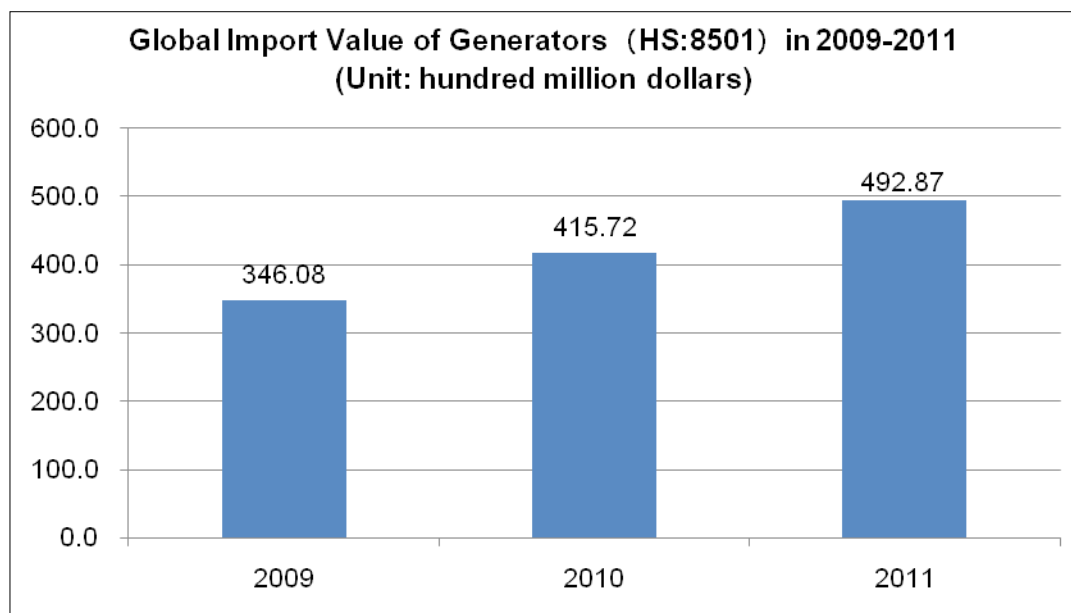
From Jan. to May in 2012, the Chinese export Quantity and Value of generators reached 1.226 billion sets and \$3.83 billion, down 13% and up 11.9% over the same period last year respectively.

The major export countries/regions include USA, Hong Kong, Japan, Germany, Italy, Thailand, Republic of Korea, India, Turkey and Indonesia, etc.

The major export sourcing regions include Guangdong, Zhejiang and Jiangsu province, and Guangdong's export accounts for 35.83% of the total export value from Jan. - May.

3. Global Import and Export Analysis of Generators in 2009-2012

3.1. Global Annual Import Value Trends of Generators(HS:8501)in 2009-2011



In 2009-2011, the world's demand for generators keeps increasing, and the import value totalized \$49.287 billion in 2011.

3.2. The Import Value of Global Major Countries/Regions Demand Generators(HS:8501)in 2009-2011

NO.	Import Countries / Regions	Import Value(hundred million dollars)			2011 Import Growth Rate compared with 2009
		2009	2010	2011	
1	USA	50.30	61.26	73.57	46.28%
2	China	31.72	38.23	45.31	42.85%
3	Germany	30.18	32.85	42.35	40.30%
4	Hong Kong	13.50	19.19	19.19	42.07%
5	Italy	12.14	14.64	17.50	44.11%
6	Japan	11.87	15.44	17.44	46.93%
7	France	12.79	14.70	16.91	32.22%
8	Mexico	8.85	11.75	13.83	56.28%
9	Republic of Korea	11.23	13.74	13.39	19.17%
10	Canada	9.37	10.69	11.79	25.79%
11	United Kingdom	8.05	9.37	10.83	34.52%
12	Netherlands	6.08	7.26	9.46	55.53%
13	India	4.10	6.01	9.05	120.40%
14	Thailand	6.18	7.68	8.80	42.37%

NO.	Import Countries / Regions	Import Value(hundred million dollars)			2011 Import Growth Rate compared with 2009
		2009	2010	2011	
15	Ukraine	0.66	0.99	8.57	1190.68%
16	Russian Federation	4.56	6.16	8.21	79.96%
17	Austria	5.38	6.47	8.04	49.55%
18	Turkey	5.07	5.89	7.93	56.51%
19	Czech Republic	9.8	11.9	14.1	50.79%
20	Malaysia	10.5	12.6	13.6	38.83%

3.3. The Market Share of Global Major Countries/Regions Demand Generators (HS:8501)in 2009-2011

NO.	Import Countries / Regions	Proportion (%)		
		2009	2010	2011
1	USA↑	14.53%	14.74%	14.93%
2	China	9.17%	9.20%	9.19%
3	Germany	8.72%	7.90%	8.59%
4	Hong Kong	3.90%	4.62%	3.89%
5	Italy↑	3.51%	3.52%	3.55%
6	Japan	3.43%	3.71%	3.54%
7	France↓	3.70%	3.54%	3.43%
8	Mexico	2.56%	2.83%	2.81%
9	Republic of Korea	3.25%	3.30%	2.72%
10	Canada↓	2.71%	2.57%	2.39%
11	United Kingdom ↓	2.33%	2.25%	2.20%
12	Netherlands	1.76%	1.75%	1.92%
13	India↑	1.19%	1.44%	1.84%
14	Thailand	1.79%	1.85%	1.79%
15	Ukraine↑	0.19%	0.24%	1.74%
16	Russian Federation↑	1.32%	1.48%	1.67%
17	Austria↑	1.55%	1.56%	1.63%
18	Turkey	1.46%	1.42%	1.61%
19	Czech Republic↑	1.51%	1.55%	1.60%
20	Malaysia	1.63%	1.78%	1.59%

Note: ↑ means that the proportion of the Chinese import value in the global total import value keep increasing and ↓ means the proportion keeps decreasing in 2009-2011.

In 2009-2011, the world's major countries/regions which demand generators include USA, China, Germany, Hong Kong, Italy, Japan, France, Mexico, Republic of Korea and Canada, etc. In 2011,

the import value of the top twenty countries all increased than in 2009 and among which Ukraine increased largest with a year-on-year growth rate 1190.68%.

3.4. The Export Value of Global Major Countries /Regions on Generators(HS:8501)in 2009-2011

NO.	Export Countries /Regions	Export Value(hundred million dollars)			2011 Export Growth Rate compared with 2009
		2009	2010	2011	
1	China	52.45	73.05	87.89	67.58%
2	Germany	53.78	58.50	71.90	33.69%
3	USA	24.33	28.56	32.71	34.46%
4	Japan	22.29	28.87	29.80	33.67%
5	Mexico	17.50	24.87	25.31	44.64%
6	France	17.29	17.22	19.76	14.23%
7	Italy	14.72	16.11	18.48	25.58%
8	Hong Kong	10.73	15.26	15.58	45.26%
9	Czech Republic	9.67	10.73	13.99	44.76%
10	Switzerland	8.05	10.21	12.96	61.02%
11	Thailand	7.92	10.16	11.72	48.02%
12	Austria	9.99	9.86	9.68	-3.08%
13	Vietnam	3.15	7.38	9.44	200.13%
14	United Kingdom	6.83	7.46	8.58	25.63%
15	Brazil	6.22	7.22	8.46	35.97%
16	Republic of Korea	5.47	5.44	7.77	41.97%
17	Chinese Taipei	4.24	5.62	7.55	77.92%
18	Netherlands	5.23	5.51	6.71	28.19%
19	Spain	6.20	5.94	6.28	1.28%
20	Finland	6.49	5.62	5.70	-12.26%

3.5. The Market Share of Global Major Countries /Regions on Generators(HS:8501)in 2009-2011

NO.	Export Countries / Regions	Proportion (%)		
		2009	2010	2011
1	China↑	15.30%	17.96%	18.69%
2	Germany	15.69%	14.39%	15.29%
3	USA↓	7.10%	7.02%	6.96%
4	Japan	6.50%	7.10%	6.34%
5	Mexico	5.11%	6.12%	5.38%
6	France↓	5.05%	4.23%	4.20%

NO.	Export Countries / Regions	Proportion (%)		
		2009	2010	2011
7	Italy ↓	4.29%	3.96%	3.93%
8	Hong Kong	3.13%	3.75%	3.31%
9	Czech Republic	2.82%	2.64%	2.98%
10	Switzerland ↑	2.35%	2.51%	2.75%
11	Thailand	2.31%	2.50%	2.49%
12	Austria ↓	2.91%	2.42%	2.06%
13	Vietnam ↑	0.92%	1.82%	2.01%
14	United Kingdom ↓	1.99%	1.84%	1.82%
15	Brazil	1.81%	1.78%	1.80%
16	Republic of Korea	1.60%	1.34%	1.65%
17	Chinese Taipei ↑	1.24%	1.38%	1.60%
18	Netherlands	1.53%	1.36%	1.43%
19	Spain ↓	1.81%	1.46%	1.34%
20	Finland ↓	1.89%	1.38%	1.21%

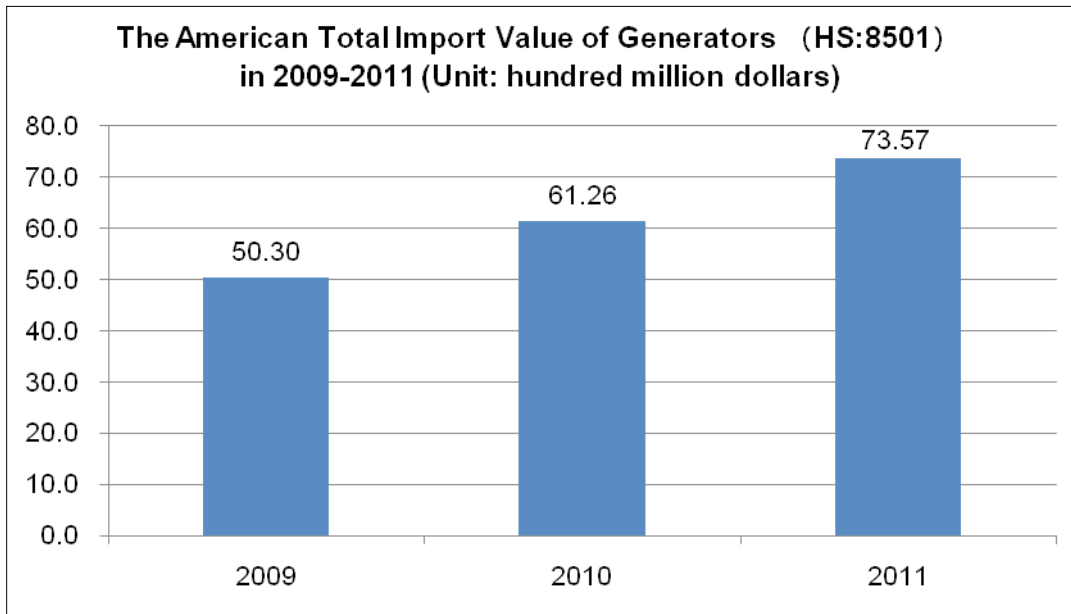
Note: ↑ means that the proportion of the Chinese export value in the global total export value keep increasing and ↓ means the proportion keeps decreasing in 2009-2011.

China is the world's largest export supply country in the field of generators and follows by Germany. In 2011, the Chinese generators export value accounts for 18.69% in the global generators total export value and the export value of the top ten supply countries all increased than the same period in 2009. Among the top twenty countries, Vietnam increased largest with an increasing rate 200.13%.

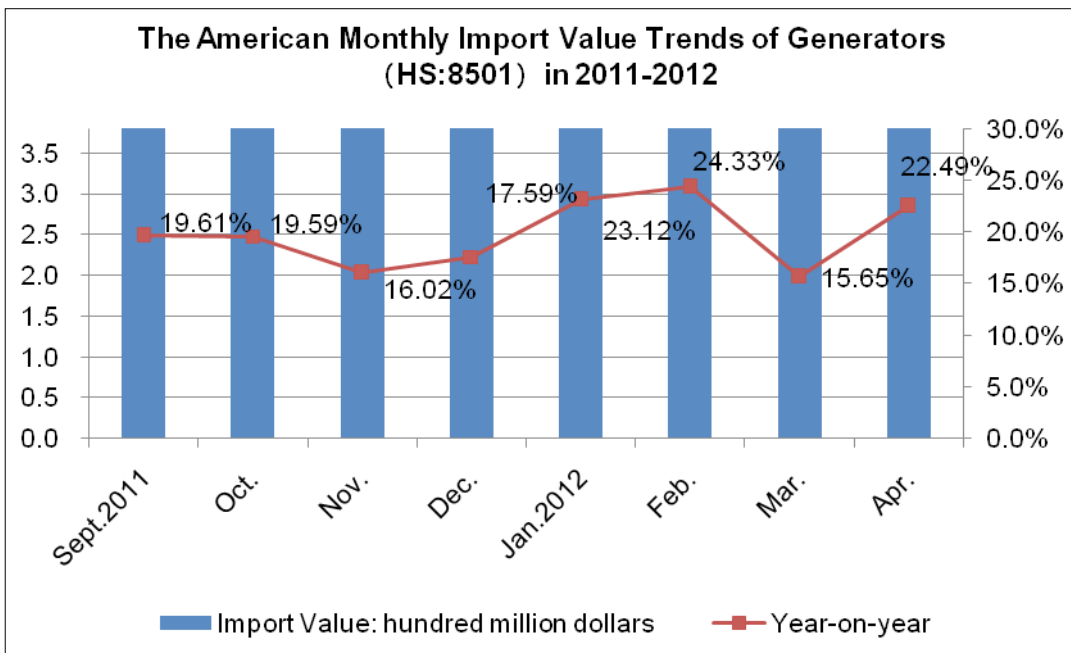
4. The Major Demand Countries of Generators in 2009-2012

4.1. The American Import of Generators(HS:8501)

- The American Import Value Trend of Generators in 2009-2011



- The American Monthly Import Value Trends of Generators in 2011-2012



- The American Major Import Sources of Generators in 2011

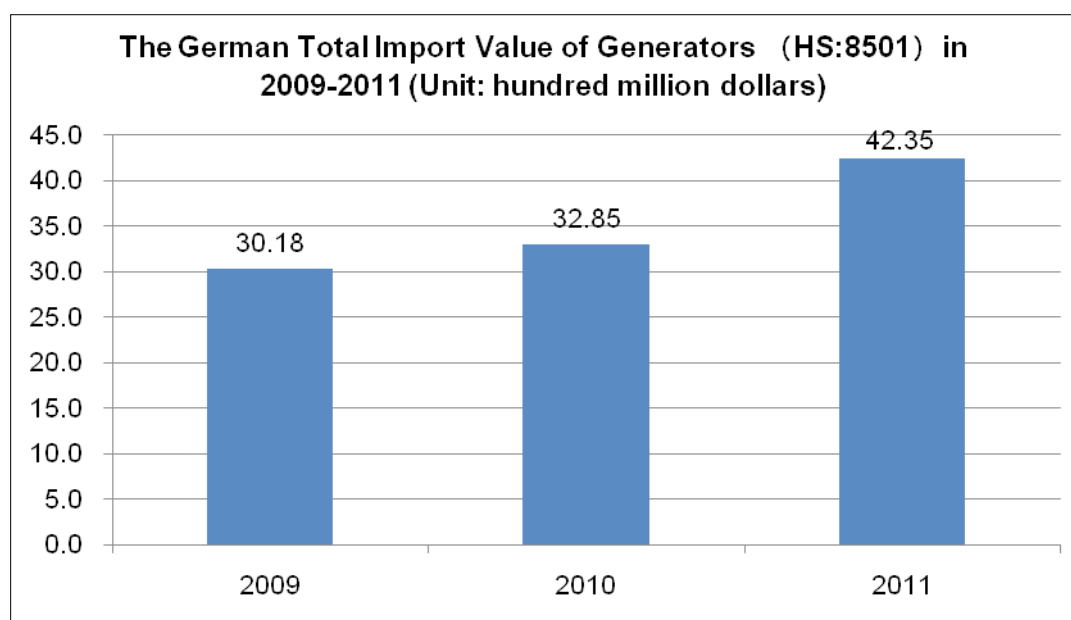
NO.	Countries /Regions	Import Value(hundred million dollars)	Year-on-Year ±%	Proportion (%)
1	Mexico	25.24	21.39%	34.31%
2	China	15.44	25.97%	20.99%
3	Japan	6.62	-5.33%	9.00%
4	Germany	5.06	39.77%	6.88%
5	Brazil	2.57	31.86%	3.49%
6	Canada	1.93	-6.59%	2.63%
7	Chinese Taipei	1.79	14.07%	2.43%
8	Switzerland	1.70	30.82%	2.32%
9	Republic of Korea	1.69	33.57%	2.29%
10	Vietnam	1.31	72.67%	1.78%

In 2009-2011, the generator import value of USA keeps increasing and in 2011, the import value reached \$7.357 billion, with a year-on-year rate 20.1%.

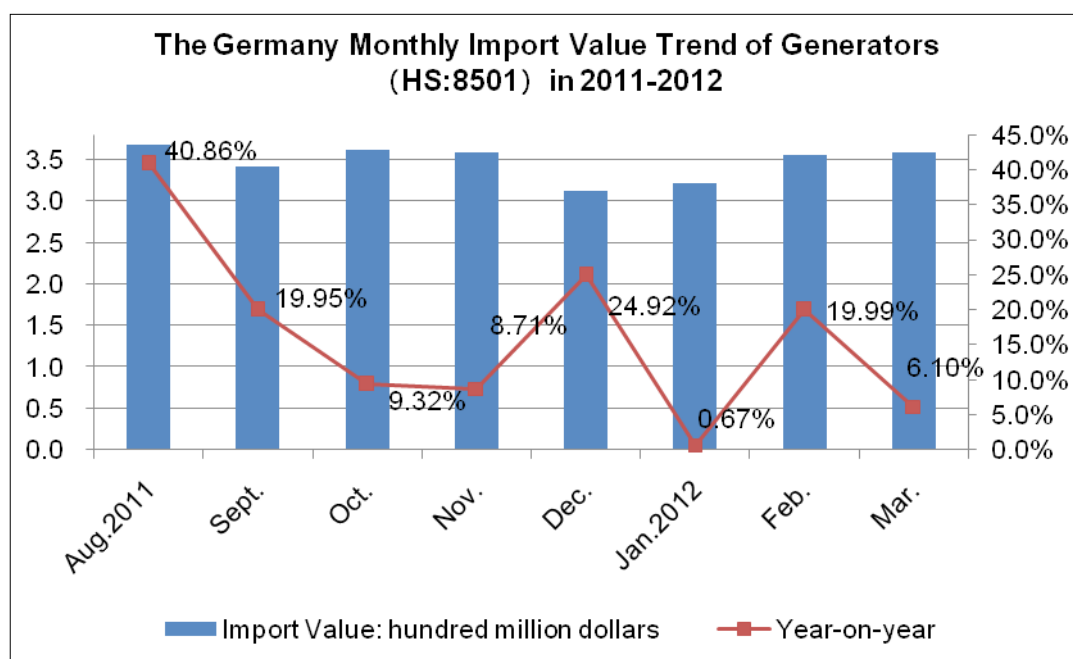
In 2011, USA mainly imported generators from Mexico、China、Japan and Germany, etc and the import from Mexico accounted for 34.31% in the total value.

4.2. The German Import of Generators(HS:8501)

- The German Import Value Trends of Generators(HS:8501)in 2009-2011



- The Germany Monthly Import Value Trend of Generators in 2011-2012



- The Germany Major Import Sources of Generators in 2011

NO.	Countries /Regions	Import Value(hundred million dollars)	Year-on-Year ±%	Proportion (%)
1	China	5.53	37.52%	13.06%
2	France	4.58	38.71%	10.82%
3	Switzerland	4.27	25.21%	10.07%
4	Italy	4.11	44.58%	9.70%
5	Czech Republic	2.89	0.42%	6.82%
6	Finland	2.24	25.57%	5.28%
7	Netherlands	1.87	60.11%	4.43%
8	Austria	1.78	27.76%	4.20%
9	USA	1.67	25.52%	3.94%
10	Spain	1.42	-1.30%	3.35%

In 2009-2011, the generator import value of Germany kept increasing and reached \$ 4.235 billion, with a year-on-year rate 28.9%.

In 2011, Germany mainly imported generators from China, France, Switzerland, Italy, and etc. The import from China accounts for 13.06% in the total value. China was the largest generators supply country for Germany.

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