Global and China Elevator Industry Report, 2016-2020

Description: In 2015, the global elevator sales volume dropped for the first time within 20 years to 803,000, down 3% year on year. This was mainly due to the decline in the housing demand in China. In 2016, the sluggish Chinese market may further drag down the global elevator sales volume to 783,000.

At present, China has become the world's largest elevator market in terms of production and consumption. Major global brands have established sole proprietorships or joint ventures in China which acts as the world's elevator factory and manufacturing center.

In 2015-2016, Chinese elevator market characterizes the followings:

1. The new elevator sales volume slumped, but it had little effect on several large elevator companies

In 2015, the real estate downturn and frequent elevator accidents led to the decline in China's elevator sales volume for the first time in recent years, from 500,000 in 2014 to 480,000, down 4% year on year. In 2016, the sales volume will continue to drop.

Sharp fall in new elevator sales exerted greater impact on SMEs (Small- and Medium-sized Enterprises) instead of several large elevator companies which saw higher sales volume by holding abundant capital, stable customers and stronger competitiveness.

In 2015, Shanghai Mechanical & Electrical Industry Co., Ltd., Canny Elevator Co., Ltd. and Guangzhou Guangri Stock Co., Ltd. achieved the respective sales volume of 61,898 units, 19,530 units and 11,016 units, up 4.5%, 10.6% and 2.0% separately.

2. The maintenance market turned to be a new profit growth engine, so that major companies intensified layout

Based on the elevator stock market, the elevator maintenance business is featured with high margin and huge market space. By the end of 2015, China had owned a total of 4 million elevators. Assuming the unit maintenance is RMB8,000 / year, Chinese elevator maintenance market size will be RMB32 billion.

Although the maintenance revenue contributes little, most of Chinese enterprises have realized that the maintenance market becomes a new profit growth engine for the elevator industry; in this case, they have stepped up the layout of a nationwide marketing network to seize the market.

By the end of 2015, Shanghai Mitsubishi Elevator Co., Ltd had established more than 80 branches and over 360 maintenance service outlets in the country; in 2015, it garnered RMB4.088 billion from installation, maintenance and other services, accounting for 23.2% of the company's total revenue.

Meanwhile, Canny Elevator Co., Ltd. set up 79 branches and service centers, of which 23 ones obtained Class-A installation and maintenance qualifications; the annual revenue of installation and maintenance reached RMB306 million, accounting for 9.4% of total revenue.

Elevator exports increased steadily thanks to the main exporters -- Jiangsu and Zhejiang

In 2015, China exported 74,101 passenger elevators, escalators and moving walkways, increasing by 5,191 units from a year ago; the export value jumped 8% year on year to USD2.1202 billion.

Zhejiang and Jiangsu are the main provinces exporting passenger elevators and escalators in China. In 2015, Jiangsu ranked first in the country with the export volume of 25,999, equivalent to 48.5% of total exports. 6,911 escalators were exported, accounting for 33.6%.

The new elevator market is expected to rebound in recent years; the maintenance market based on the stock market will grow stably

In 2016, the elevator demand is expected to fall again amid the slowdown of Chinese real estate sector, and
the sales volume is estimated at about 470,000. In 2017-2020, the sales volume may rebound under the
impetus of urbanization, aging population, fast-growing urban rail transit, gradual enforcement of elevator
installation policies as well as an increasing number of old elevators to be replaced. By 2020, the sales
volume is expected to reach 650,000, the elevator ownership 5.9 million, and the maintenance market size
RMB47.2 billion.

Global and China Elevator Industry Report, 2016-2020 highlights the followings:

- Overview of global elevator industry, including new elevator market, maintenance market and competitive
landscape;

- Overview of China elevator industry, embracing new elevator market, maintenance market, development
trend and competitive landscape between major companies;

- Demand of China elevator industry, covering demand structure and main influencing factors;

- Operation, elevator business, output, sales volume, major projects and major customers of 10 domestic
elevator companies; operation, elevator business and development in China of seven foreign elevator
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