

**2007-2008 年中国
风机产业研究报告**

China Fan Industry Report,
2007-2008

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序号	AY024	报告名称	2007-2008 年中国风机产业研究报告				
字数	3 万	图表数量	58	报告页数	62	完成时间	08 年 8 月
语种	中文	电子版价格(RMB)	6000		纸质版价格(RMB)	5500	
语种	英文	PDF (USD)	\$ 1,800		Hard Copy (USD)	\$ 1,700	

摘要

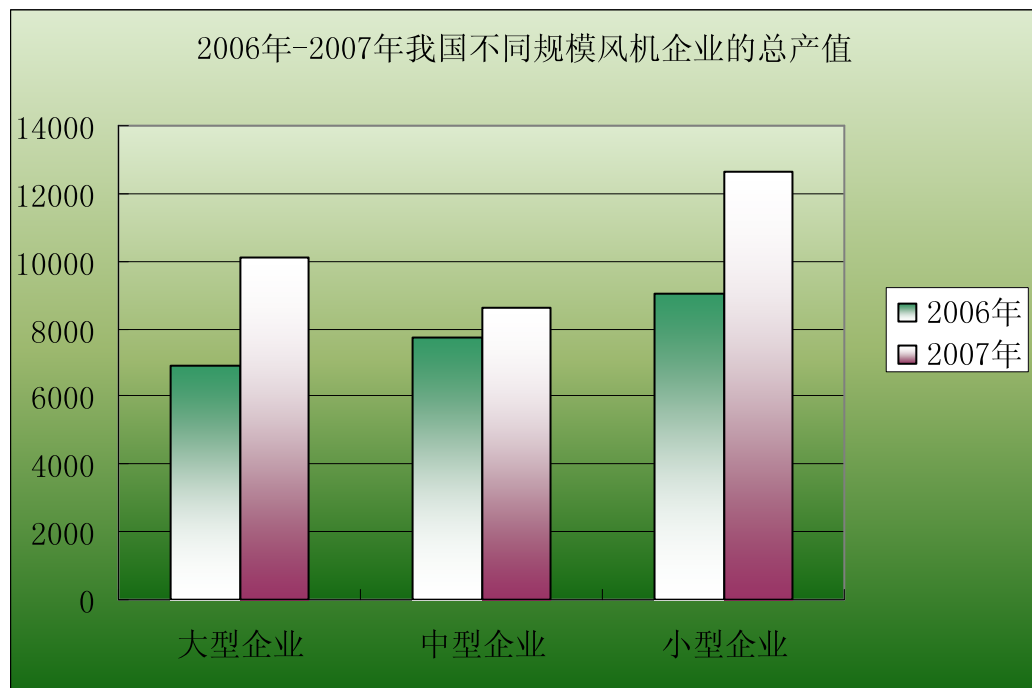
风机是对气体压缩和气体输送机械的总称。在中国，通常意义上的风机包括通风机、鼓风机、压缩机以及罗茨鼓风机，但是不包括活塞压缩机等容积式鼓风机和压缩机。

风机广泛用于工厂、矿井、隧道、冷却塔、车辆、船舶和建筑物的通风、排尘和冷却；锅炉和工业炉窑的通风和引风；空气调节设备和家用电器设备中的冷却和通风；谷物的烘干和选送；风洞风源和气垫船的充气 and 推进等。

2007年，中国风机制造业工业总产值、新产品产值、工业销售产值等均较上年有较大幅度增长；行业的整体销售能力和规模扩张速度都有了提高；综合来看行业运营能力高于上年，并且行业外部市场需求旺盛，增长的潜力仍然较大。受国家宏观调控和能源、原材料价格持续上涨的影响，行业整体盈利能力较2006年有所下降。

中国风机、风扇制造业的巨大需求引起了众多国外知名厂商的关注，世界一流的风机制造商相继进入中国，并通过合并和收购方式日益壮大，占领了相当大的市场份额。

我国风机行业的企业分布比较零散，不同类型企业有不同的市场面。比如各式中小型通风机和其它风机产品由于技术含量相对较低、附加价值较低，故多由中小企业和乡镇企业生产，绝大多数中小型企业生产的通风机都是大众化的通用产品，没有自己独特的主导产品，竞争能力一般。



数据来源：国家统计局 单位：百万元。

2008 年中国风机行业仍保持高速增长的态势，企业数达到 470 家，1~2 月工业总产值 53.52 亿，

	同比增长 39.01%，1~5 月风机产量达到 172.37 万台，同比增长 34.46%。
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Title	China Fan Industry Report, 2007-2008	Pages	62
Price	PDF USD \$ 1, 800 Hard Copy USD \$ 1, 700 Enterprisewide USD \$ 2,700	Release Date	Aug/2008
Abstract	<p>Fan is the common name of gas compressor and gas transportation machine. Generally speaking, fan in China includes ventilator, blower, compressor and Roots blower, but excludes positive displacement blower and compressor such as piston compressor.</p> <p>Fan serves as a ventilator, deduster and cooler in factories, mines, tunnels,</p>		

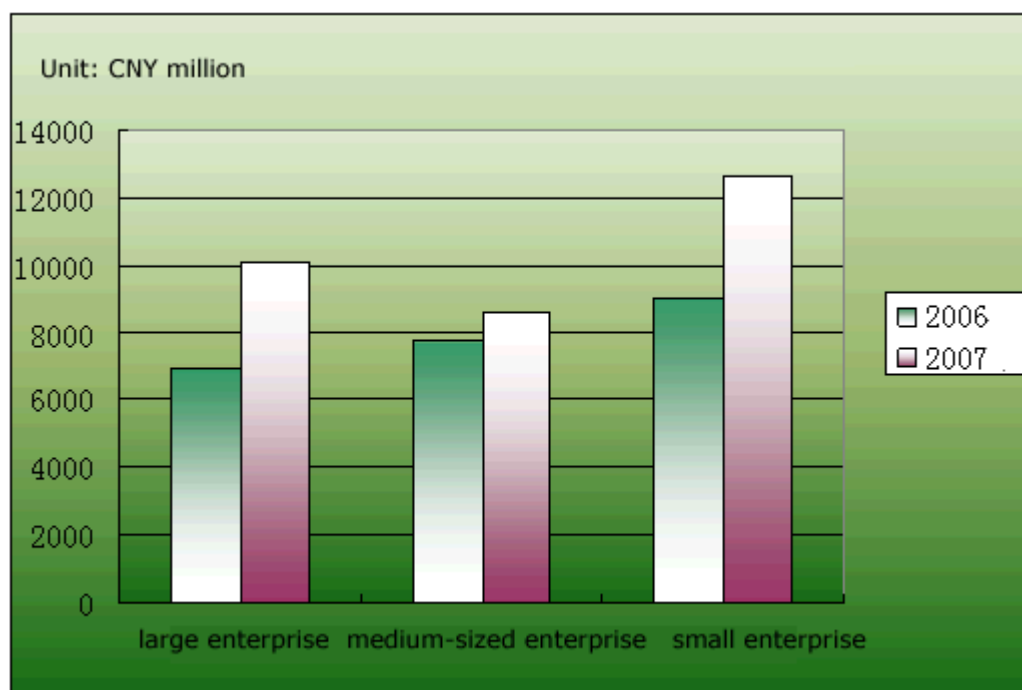
cooling towers, vehicles, ships and buildings and plays the role of ventilation and induced draft in boiler and industrial furnace. Fan always acts as a ventilator and cooler in air-conditioning equipment and household appliances and plays the role of a grain dryer. Fan is also able to provide air to wind tunnels and pump and propel hovercrafts.

In 2007, the total industrial output value, the output value of new products and the industrial sales output value of China's fan industry all increased by a big margin compared to the previous year. The industry made progress in improving its marketing skills and accelerating its capacity expansion and its operation ability was better than the previous year. The External market demand of the industry is robust and the industry still has a big growth potential. The profitability of the entire industry declined a bit in the year of 2006, due to impact of macro economic control and increasing rises in prices of energy and raw materials.

China's huge demand for fan and fan manufacturing industry has aroused the concern of many well-known overseas fan producers, who have been lured into the Chinese market consecutively. These world's leading manufacturers are growing continuously through mergers and acquisitions, taking up a considerably big market share.

China's fan producers are fragmented, scattering across the country, and different types of companies have different markets. All kinds of medium and small size ventilators and other fan products are manufactured by medium- and small-sized companies and township-run enterprises, due to their low technical content and low added value. Most of the ventilators produced by the medium- and small-sized companies are general products that are lack of uniqueness and have general competitive edge.

**Total Output Value of China's Fan Companies with Different Sizes
2006-2007**



Source: National Bureau of Statistics of China

China's fan industry remains the momentum of rapid development in 2008. At present, China has 470 fan producers. The total industrial output value of China's fan industry in the first two months of this year hit CNY5.35 billion, up 39.01% year on year. China's fan output in the first five months reached 1.72 million units, up 34.46% year on year.

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