



China Valve Industry Report, 2010-2011

July 2011

This report

- ◆ **Analyzes the valve market in China**
- ◆ **Focuses on main applications of valve**
- ◆ **Highlights the key enterprises in China and worldwide**

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Abstract

In Jan.-May 2011, China witnessed the valve output of 2.06 million tons in total, up 22% year-on-year. The output increased by leaps and bounds mainly owed to the restoration of downstream demand. By region, the valve output from Zhejiang, Henan, Jiangsu, Shanghai, Liaoning and Shandong occupied 81.9% of the total in the first five months of 2011, of which, Zhejiang enjoyed the biggest 32.6%. China has many valve manufacturers, featuring fierce market competition and low industry concentration. The top 10 enterprises' aggregated sales accounted for 6% of the industry's total.

This report not only studies the overall situation, regional distribution, import & export and competition pattern of China's valve industry, but also analyzes in detail the market status, competition pattern and key enterprises in major market segments, such as metallurgy valve, nuclear valve, air conditioning valve and petrochemical valve, and gives prediction for the market scale of these segments.

Valve Output and Proportion by Region in China, Jan.-May 2011

Province/Municipality	Output (ton)	Proportion (%)
Zhejiang	671,609	32.6%
Henan	488,192	23.7%
Jiangsu	158,434	7.7%
Shanghai	146,471	7.1%
Liaoning	113,682	5.5%
Shandong	110,044	5.3%
Sichuan	64,136	3.1%
Hebei	52,972	2.6%
Guangdong	52,87	2.6%
Others	202,452	9.8%
Total	2,060,86	100.0%

Source: National Bureau of Statistics of China

In the metallurgy valve field, the technology reformation carried out in China's steel industry put a higher demand for the technical process of metallurgy valves. According to the scales of newly constructed and technological transformation projects in Chinese steel industry, it is expected that the metallurgy valves worth RMB345 million will be demanded by 2015. Jiangsu Shentong Valve Co., Ltd., Shijiazhuang No.1 Valve Company Ltd., and Shijiazhuang Sanhuan Valve Co., Ltd. are the major manufacturers, wherein, Jiangsu Shentong Valve Co., Ltd. occupied an overwhelmingly dominant position in this market segment, with market share around 70%.

By 2010, there are 23 units with the license for design and manufacturing of civilian nuclear safety equipment valves in China, among which, Jiangsu Shentong Valve Co., Ltd. is unmatched in nuclear butterfly valves and nuclear ball valves, while Wujiang Dongwu Machine Co., Ltd. is good at producing nuclear safety valves.

In the air conditioning valve field, as inverter air conditioner witnessed an accelerated popularization in China, it will bring about significant demand for its core component - electronic expansion valve. The air conditioning valve industry is highly concentrated. Zhejiang Sanhua Co., Ltd. and Zhejiang Dun'an Artificial Environmental Equipment Co., Ltd. dominated 70% of the global market. Sanhua saw its sales volume of electronic expansion valve grow by over 70% year on year in 2010, its capacity will reach 10 million after its household air-conditioning electronic expansion valve project achieves the target output in 2011, and its market share will be further raised.

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