



China Valve Industry Report, 2011-2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

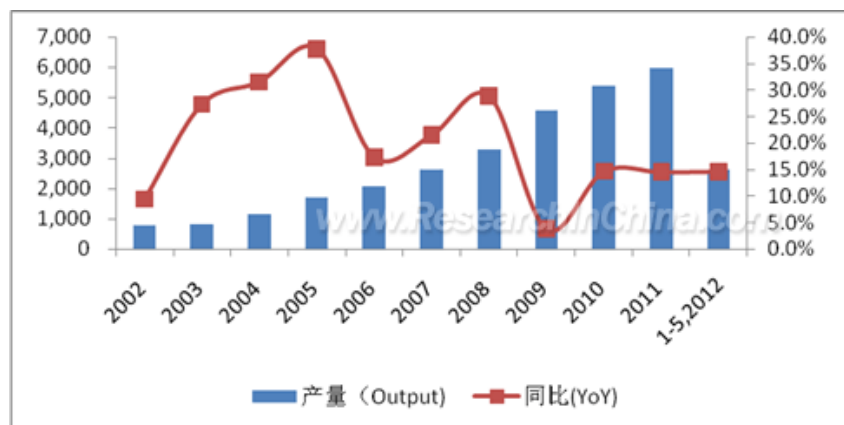
INFORMATION SOURCES

The primary information sources include China Customs and National Bureau of Statistics of China etc.

Abstract

From January to May in 2012, China's output of valves hit 2.629 million tons, up 14.6% year-on-year. In 2012, amid the severe economic downturn in China, "steady growth" once again becomes the focus of national policy, and fixed asset investments in such sectors as steel, water conservancy and hydropower, and railway gradually resume. The valve output in China is estimated to maintain stable growth in 2012 fueled by the investment.

Valve Output and YoY Growth Rate in China, 2002-2012 (kt)



Source: National Bureau of Statistics of China < China Valve Industry Report, 2011-2012 >

This report not only highlights the output, regional distribution, import & export and competition pattern of Chinese valve industry, but also analyzes the status quo and competitive landscape of market segments like metallurgy valve, nuclear power valve, air conditioning valve and petrochemical valve, and predicts the market scale of these segments. Additionally, the report studies the operation of 8 foreign valve corporations including Danfoss and KSB, etc., and 22 Chinese counterparts such as Zhejiang Sanhua Co., Ltd. and Jiangsu Shentong Valve Co., Ltd., etc.

Metallurgy Valve

The technical reformation carried out in China's steel industry poses higher requirements on the technology process of metallurgy valves. According to the scales of newly constructed and technological transformation projects in Chinese steel industry, it is expected that the China's demand for metallurgy valves will reach RMB345 million by 2015. Jiangsu Shentong Valve Co., Ltd., Shijiazhuang No.1 Valve Company Ltd., and Shijiazhuang Sanhuan Valve Co., Ltd. are the major manufacturers in China.

Nuclear Power Valve

Following the safety inspection of nuclear power generating units in 2011, China will restart the nuclear power project approval in 2012, when the nuclear valve market will begin to recover. Chinese nuclear power valve market is predominantly occupied by foreign manufacturers such as KSB and VELAN, etc., and the competitive domestic players include Jiangsu Shentong Valve Co., Ltd., Dalian DV Valve Co., Ltd. and Wujiang Dongwu Machine Co., Ltd., etc.

Air Conditioning Valve

In the air conditioning valve field, although there are signs of slackening in the growth rate of air-conditioner output in China in 2012, the market share of inverter air-conditioners rises rapidly, which will bring about robust demand for its core component--electronic expansion valve. Zhejiang Sanhua Co., Ltd. and Zhejiang Dun'an Artificial Environmental Equipment Co., Ltd. dominated approximately 70% of the global market. Sanhua saw its sales volume of electronic expansion valves get to around 7 million sets in 2011.

Petrochemical Valve

The petrochemical industry is the largest valve consumer in China. The home-made general valves can basically meet the need of petrochemical production, but some special valves still depend on imports. The major players in this field are Neway Valve (Suzhou) Co., Ltd., Liangjing Group Valve Co., Ltd. and Lanzhou High Pressure Valve Co., Ltd., etc.

With metallurgy valve and nuclear power valve as its leading products, Jiangsu Shentong Valve boasts sharpening edges in metallurgy valve market, with market share surpassing 50%. But in recent years, the nuclear power valve contributed to a rising percentage of the company's revenue.

CNNC SUFA Technology Industry Co., Ltd. mainly produces nuclear power valve, nuclear chemistry valve and other special valves. In Q1 2012, the revenue of the company surged 50.1% YoY to RMB171 million. The company principally aims at high-end valve market and its three nuclear power valve projects initiated at the end of 2010 will be basically completed by the end of 2012, when the company's capacity will be substantially improved.

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Zhejiang Sanhua Co., Ltd. specializes in manufacturing automatic control parts for household and commercial air-conditioners and is one of the Globe valve manufacturers enjoying the largest output and most complete product portfolio in the world. As of 2011, the company boasted capacity of 50 million Globe valves, over 40 million four-way valves and 7-8 million electronic expansion valves.

The valve products of Neway Valve (Suzhou) are strongly competitive in petroleum industry and the well-known companies like GE Oil and Gas and TSI Service and Supply are the company's customers. In 2012, Neway Valve (Suzhou) makes preparation for IPO and plans to raise funds for its large-diameter valve and special valve project with annual capacity of 35,000 sets and petroleum valve project with annual capacity of 10,000 sets.

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