



**Global and China Hydraulic Industry
Report, 2011-2012**

Sept. 2012

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 China Hydraulics Pneumatics & Seals Industry Association, National Bureau of Statistics of China and WIND Database etc.

Abstract

Benefiting from the large-scale investment plan launched after the financial crisis, China's hydraulic industry saw rapid development in 2010 and 2011. In 2011, the output value of the hydraulic industry reached RMB43.6 billion, up 24.2% year on year. At present, China ranks second in terms of hydraulic industry sales in the world, only second to the United States. Since 2012, Chinese economy has undertaken the downward pressure, and the demand in engineering machinery and other industries has been sluggish, which has led to the decline in the growth rate of the hydraulic industry.

The total amount of China's hydraulic industry is in the global forefront, but some high-end hydraulic parts are still imported in large scale. In 2011, the import value of China's hydraulic industry reached USD3.6 billion, up 26% year on year.

With the expansion of Chinese hydraulic market, foreign hydraulic manufacturers have increased their investment in China; in recent two years, Bosch-Rexroth, Parker-Hannifin, Kawasaki and other enterprises have expanded their plants in China. On the other hand, major Chinese main engine enterprises have also invested in the hydraulic industry in order to control the supply of key parts, so the competition in Chinese hydraulic market will become more intense.

The report mainly studies the following aspects: Market size and competitive situation of global and China hydraulic industry; import & export and downstream industries of China hydraulic industry. In addition, the report analyzes the operation of seven world-renowned hydraulic manufacturers (including Bosch-Rexroth, Eaton, Parker Hannifin, Kawasaki, etc.) and 14 Chinese enterprises (including Hengli Highpressure Oil Cylinder, Yuci Hydraulics, Avic Liyuan Hydraulic, etc.).

Bosch-Rexroth produces 2.5 million hydraulic components annually. In 2011, it achieved the revenue of EUR6.4 billion. Bosch-Rexroth has established factories in Shanghai, Beijing, Changzhou and Xi'an. In 2011, it gained the sales of nearly EUR1 billion in China. In recent years, Bosch-Rexroth has expanded its investment in China. In 2010, it set up a new plant in Changzhou to expand the hydraulic product line. Bosch-Rexroth built a hydraulic service center in Changsha in January 2012, and it is also preparing to invest in hydraulic production bases.

Hengli Highpressure Oil Cylinder has 23% share in Chinese excavator-use cylinder market, and major Chinese main engine makers including Sany, Liugong and XCMG are its major clients. Since 2011, Hengli Highpressure Oil Cylinder has actively explored overseas markets. In 2012, Hengli Highpressure Oil Cylinder will provide 20,000 and 10,000 excavator-use cylinders for Caterpillar and Japan's Kobe Steel respectively.

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