



China Non-standard Special Material Equipment Industry Report, 2012-2015

Nov. 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 include China Chemical Industrial Equipment Association, and China Chemical Industrial Mechanism Power Technology Association etc.

Abstract

In China, the non-standard special material equipment industry is an emerging industry derived from the fast development of new material industry and advanced equipment manufacturing, particularly encouraged by the government. In recent years, following the increasing fixed asset investments in downstream sectors such as petrochemicals, fine chemicals, coal chemicals and hydrometallurgy, the non-standard special material equipment industry of China has seen rapid growth.

The non-standard special material equipment industry covers two major categories of products, i.e. non-standard special material pressure vessels and pressure pipes & pipe fittings, of which, the former is provided with large scale of output value. In 2011, Chinese market demand for non-standard special material pressure vessel products was approximately RMB32.8 billion, while for non-standard special material pressure pipe products about RMB14.6 billion. In future, with the higher requirements on anti-corrosion, thermostability and other properties of core equipments like pressure vessels and pressure pipes from downstream chemicals, pharmaceuticals, metallurgy, marine equipment, etc., the high-grade stainless steel, non-ferrous metal composite materials-oriented non-standard special material equipment has considerably broad prospects for market demand.

At present, Chinese non-standard special material equipment manufacturers enjoys a higher regional concentration, located in three industrial clusters i.e. the Eastern Region centered by Nanjing, the Northwestern Region centered by Baoji, and the Circum-Bohai-Sea Region centered by Shenyang.

In China, non-standard special material equipment manufacturers are mainly divided into two groups. First, ones engaged in the manufacturing of carbon steel and general stainless steel pressure vessel products, which haven't developed high production capacity in the field of special material pressure vessel products, but equipped with benign manufacturing facilities and marketing channels; representative firms include China First Heavy Industries (CFHI), China National Erzhong Group, Zhangjiagang Chemical Machinery, etc.

Second, ones with non-standard special material equipments as leading products. There are currently over 400 such manufacturers in China, while only more than a dozen enterprises possess independent design, R&D and large-scale production, of which, Nanjing Baose Co., Ltd., Nanjing Special Metal Equipment Co.,Ltd., Jiangsu Sunpower Technology Co., Ltd. and Xi'an Nuclear Equipment Co., Ltd. are leaders in this area.

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With Baoti Group as its controlling shareholder, Nanjing Baose Co., Ltd boasts certain superiorities in the supply of titanium, zirconate titanate and other upstream materials. In recent years, following the fast-growing demand for non-standard special material equipments from downstream industries, the company's product manufacturing has gradually achieved full-load status. Through the efforts to increase investment in new projects, the comprehensive productivity rose from 8,000 tons in 2009 to 11,850 tons in 2011.

As a non-standard special material equipment manufacturer integrating R&D, design and production, Nanjing Special Metal Equipment Co.,Ltd is occupied in the manufacturing of reactors, heat exchangers, separators, storage vessels, etc.. The capacity has been relatively tight over the years, in order to satisfy the ever-increasing order request, the company has launched expansion reconstruction of production plants in 2009, and now it has owned the real capacity of nearly 4,500 t/a.

The Singapore-listed Sunpower Group is capable of designing and producing standard and non-standard pressure vessel and pressure pipe products made from zirconium, titanium, nickel, tantalum and other non-ferrous metals and their composite materials, with heat exchangers and pressure vessels as its leading products.

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