



China Vacuum Pump Industry Report, 2013-2016

May 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

As a device pumping gases at a high speed to improve and maintain a vacuum state within a wide pressure range, vacuum pump is widely applied in the industries such as metallurgy, chemical, food and electroplating.

In 2011, the output of vacuum pump in China registered 7.3996 million sets, with a year-on-year rise of 12.6%. In 2012, the figure approximated 8.5 million sets, rising by 15% from a year earlier. Affected by downstream demand and environmental protection pressure, the product segments of vacuum pump behave differently. For example, in spite of a wide application scope, the market share of water ring vacuum pump shrinks gradually due to the restriction of environmental protection pressure; the dry vacuum pump rose sharply and performed well in 2012, and the high-end market is mainly dominated by enterprises from Europe, America and Japan.

From the perspective of vacuum pump import/export unit price in China, the vacuum pump import unit price amounted to USD252.08/set in 2012, while the export unit price reached USD42.35/set in same term, indicating relatively high import dependency on high-end products.

Along with the improvement of technical level of vacuum pump in China, the import unit price is now witnessing decline gradually.

As of the end of 2012, major foreign-funded enterprises of vacuum pump have made arrangements in Chinese market, including Gardner Denver, Leybold ULVAC, Osaka Vacuum, Tuthill, Edward, etc.. In particular, Gardner Denver has established 9 subsidiaries in China, involving Gardner Denver Nash Machinery (with major sales brand as Nash), Gardner Denver Thomas Pneumatic Systems (Wuxi) (Thomas), ILMVAC Trading (Shanghai) (ILMVAC), Gardner Denver Trading (Shanghai) (Elmo Rietschle), Gardner Denver Machinery (Shanghai) (Air Drive, Drum, Emco Wheaton, Gardner Denver, TODO and Wittig) and so on.

Import/Export Volume of Vacuum Pump in China, 2010-2012

	2010	2011	2012	2013,1-3
Export (Set)	3241989	3286368	3400425	695895
Export (Set/USD)	33.00	41.99	42.35	45.98
Import (Set)	849283	983481	1344814	444283
Import (Set/USD)	400.34	467.73	252.08	189.07

Source: China Customs; ResearchInChina China Vacuum Pump Industry Report, 2013-2016

The main contents of China Vacuum Pump Industry Report, 2013-2016 involve:

- Market size, import & export and market competition pattern (layout of global enterprises in China, development of local enterprises in China, etc.) of vacuum pump in China during 2011-2016;
- Market profile of vacuum pump market segments, and output and sales volume of major manufacturers (water ring vacuum pump and dry vacuum pump);
- Profile, major brands, vacuum pump business and arrangement in China of 10 foreign-funded enterprises;
- Profile, major brands, output and sales volume of major products, etc. of 17 local vacuum pump manufacturers in China.

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 - 1.1.1 Definition
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