



**Global and China Valve Industry Report,
2012-2015**

July 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

From 2003 to 2009, China's valve industry experienced a period of rapid growth, with a CAGR of 33.5%. But in recent years, affected by economic crisis, the valve market demand started to slow down from 2010 onwards, and China's valve output growth rate fell accordingly, down to 8.9% till May, 2013.

In point of market competition pattern, China's valve production features a high degree of regional concentration, mainly in Zhejiang, Henan, Jiangsu, Liaoning, Fujian and other provinces and cities. In 2012, output from the top five provinces accounted for 74% of the total. However, due to the small scale and weak financial strength of domestic valve companies, the market concentration is lower than other countries.

Since 2009, China has ranked first worldwide in valve export scale. In 2012, the export volume gradually converged in large companies, with export products showing diversification; the top few export destinations remained basically unchanged from the previous years. With respect to imports, most of imported valves in China are high-end and high-priced products. But with the increasing R&D investment and market development efforts, Chinese valve companies are stepping into the high-end valve market.

Output and YoY Growth Rate of Valves in China, 2003-2013 (kt)



Source: National Bureau of Statistics of China, ResearchInChina Global and China Valve Industry Report, 2012-2015

In addition to a study on the development status and trends of Chinese valve industry, Global and China Valve Industry Report, 2012-2015 also analyzes the operating status and development prospects of leading companies.

As a key player in China's nuclear power valve industry, Sufa Technology Industry Co., Ltd. of CNNC is provided with enormous technical strength. In 2012, following the gradual recovery of domestic nuclear power plant construction, the company continued to expand business, realizing growth in both revenue and net income against the adverse economic conditions.

Zhejiang Sanhua Co., Ltd. is one of the world's air conditioning valve manufacturers with the most complete varieties, occupying the largest share of stop valve and four-way valve markets, going halves with DunAn Environment. In 2012, under the influence of Chinese macroeconomic policy adjustments and stimulus exit, the entire air conditioning appliance industry demand decreased, and the downstream demand reduction triggered declines in both revenue and net income of Sanhua.

1. Overview of Valve

- 1.1 Definition
- 1.2 Classification

2. Valve Market in China

- 2.1 Supply
 - 2.1.1 Output
 - 2.1.2 Regional Analysis
- 2.2 Import and Export
- 2.3 Competition Pattern
 - 2.3.1 Characteristics
 - 2.3.2 Ranking of Valve Enterprises

3. Major Downstream Applications

- 3.1 Petrochemical Valve
 - 3.1.1 Market Profile
 - 3.1.2 Localization Process
- 3.2 Nuclear Power Valve
 - 3.2.1 Types and Features
 - 3.2.2 Market Capacity
 - 3.2.3 Market Competition
 - 3.2.4 Localization Process
- 3.3 Air Conditioning Valve
 - 3.3.1 Types
 - 3.3.2 Industry Characteristics
 - 3.3.3 Market Capacity
 - 3.3.4 Market Competition Pattern
- 3.4 Metallurgical Valve

- 3.4.1 Types and Features
- 3.4.2 Market Capacity
- 3.4.3 Market Competition

4. Key Companies in China

- 4.1 Sufa Technology Industry Co., Ltd. of CNNC
 - 4.1.1 Profile
 - 4.1.2 Operation
 - 4.1.3 Revenue Structure
 - 4.1.4 Gross Margin
 - 4.1.5 Development Prospect
- 4.2 Jiangsu Shentong Valve Co., Ltd.
 - 4.2.1 Profile
 - 4.2.2 Operation
 - 4.2.3 Revenue Structure
 - 4.2.4 Gross Margin
 - 4.2.5 Development Prospect
- 4.3 Hubei Hongcheng General Machinery Co., Ltd.
 - 4.3.1 Profile
 - 4.3.2 Operation
 - 4.3.3 Revenue Structure
 - 4.3.4 Gross Margin
- 4.4 Zhejiang Sanhua Co., Ltd.
 - 4.4.1 Profile
 - 4.4.2 Operation
 - 4.4.3 Revenue Structure
 - 4.4.4 Gross Margin
 - 4.4.5 Developments

- 4.4.6 Development Prospect
- 4.5 DunAn Environment
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Revenue Structure
 - 4.5.4 Gross Margin
 - 4.5.5 Business Prospects
- 4.6 China Valves Technology Inc.
 - 4.6.1 Profile
 - 4.6.2 Operation
 - 4.6.3 Henan Kaifeng High Pressure Valve Co., Ltd
 - 4.6.4 Zhengzhou City ZD Valve Co., Ltd.
- 4.7 Neway Valve (Suzhou) Co., Ltd.
- 4.8 Jiangnan Valve Co., Ltd.
- 4.9 Yuanda Valve Group Co., Ltd.
- 4.10 Zhejiang Petrochemical Valve Co., Ltd.
- 4.11 Dalian DV Valve Co., Ltd.
- 4.12 Zhejiang Chaoda Valve Co., Ltd
- 4.13 Lanzhou High Pressure Valve Co., Ltd.

5. Key Companies Abroad

- 5.1 Pentair
- 5.2 Emerson
- 5.3 Crane Company
- 5.4 Flowserve
- 5.5 Cameron
- 5.6 Kitz

- Structure of Demand for Valves by Type in China
- Output and YoY Growth Rate of Valves in China, 2003-2013
- Valves Output by Region in China, 2012
- Import Volume and YoY Growth Rate of Valves in China, 2003-2013
- Import Value and YoY Growth of Valves in China, 2003-2013
- Export Value of Valves in China, 2004-2012
- Comprehensive Strength Ranking of China's Valve Manufacturers
- Proportion of Downstream Applications of Valve Products in China, 2011
- Valve Products Used in Nuclear Power Field (Partial)
- Nuclear Island Valves by Security Level
- Development Plan for China Nuclear Power Industry, 2010-2020E
- Schematic Drawing for Investment Structure of Nuclear Power Station in China
- Nuclear Power Valve Investment in China 2015-2020E
- Comparison of Leading Products of Major Nuclear Power Valve Manufacturers in China
- Market Capacity of Globe Valves and 4-way Valves for Air Conditioning in China, 2008-2015E
- Inverter Air Conditioner Sales and Electronic Expansion Valve Consumption in China, 2008-2015E
- Competition Pattern of 4-Way Valve Market Worldwide, 2012-2015E
- Competition Pattern of Globe Valve Market Worldwide, 2012-2015E
- Competition Pattern of Solenoid Valve Market in China, 2012-2015E
- Market Share of Electronic Expansion Valve in China, 2012
- Environment-friendly and Energy-efficient Valve Products Used in Metallurgy (Partial)
- Fixed Assets Investment and YoY Growth Rate of China Steel Industry, 2011-2015E
- Demand for Iron and Steel in China, 2012-2013
- Market Capacity of Special Valves Needed for New Projects and Technological Upgrading Projects of Chinese Steel Industry, 2010-2015E

- Major Metallurgical Valve Manufacturers in China
- Revenue and Net Income of CNNC Sufa Technology Industry, 2009-2013
- Revenue of CNNC Sufa Technology Industry by Product, 2009-2012
- Revenue of CNNC Sufa Technology Industry by Region, 2009-2012
- Gross Margin of CNNC Sufa Technology Industry by Product, 2009-2012
- Revenue and Net Income of CNNC Sufa Technology Industry, 2012-2015E
- Revenue and Net Income of Jiangsu Shentong Valve, 2009-2013
- Revenue of Jiangsu Shentong Valve by Product, 2009-2012
- Gross Margin of Jiangsu Shentong Valve by Product, 2009-2012
- Revenue and Net Income of Jiangsu Shentong Valve, 2012-2015E
- Revenue and Net Income of Hubei Hongcheng General Machinery, 2009-2013
- Revenue of Hubei Hongcheng General Machinery by Product, 2009-2012
- Gross Margin of Hubei Hongcheng General Machinery by Product, 2009-2012
- Revenue and Net Income of Zhejiang Sanhua, 2009-2013
- Revenue of Zhejiang Sanhua by Product, 2009-2012
- Revenue of Zhejiang Sanhua by Region, 2009-2012
- Gross Margin of Zhejiang Sanhua by Product, 2009-2012
- Revenue and Net Income of Zhejiang Sanhua, 2012-2015E
- Revenue of DunAn Environment by Product, 2009-2012
- Gross Margin of DunAn Environment by Product, 2009-2012
- Revenue and Net Income of DunAn Environment, 2012-2015E
- Revenue and Net Income of China Valves Technology, 2009-2012
- Sales of China Valves Technology by Industry, 2009-2012
- Operating Revenue of Neway Valve (Suzhou), 2009-2011

- Revenue of Neway Valve (Suzhou) by Region, 2009-2011
- Gross Margin of Neway Valve (Suzhou), 2009-2011
- Fundraising Projects of Neway Valve (Suzhou), 2012
- API 6A Products, Christmas Trees and Imported Installations of Neway Valve (Suzhou)
- Operating Revenue of Yuanda Valve, 2004-2010
- Operating Revenue of Zhejiang Petrochemical Valve, 2004-2010
- Operating Revenue of Dalian DV Valve, 2004-2010
- Operating Revenue of Zhejiang Chaoda Valve, 2004-2010
- Key Financial Indicators of Pentair, 2008-2012
- Net Sales of Pentair by Business Segment in 2012
- Sales of Pentair by Region in 2012
- Gross Profit and Gross Margin of Pentair, 2010-2012
- Key Financial Indicators of Emerson, 2009-2012
- Sales Proportion of Different Business Segments in 2012
- Sales Proportion of Crane by Business Segment in 2012
- Key Financial Indicators of Crane, 2009-2012
- Key Financial Indicators of Fluid Handling Segment, 2009-2012
- Net Sales of Valve Group, 2009-2012
- Key Financial Indicators of Controls Segment, 2009-2012
- Key Financial Indicators of Flowserve, 2009-2012
- Sales Proportion of Flowserve by Business Segment in 2012
- Key Financial Indicators of Flow Control Division, 2009-2012
- Sales of Flowserve by Region in 2012
- Gross Profit and Gross Margin of Flowserve, 2009-2012
- Revenue Proportion of Flowserve in Different Industries in 2012

- Revenue and Net Income of Cameron, 2009-2012
- EBIDA of Cameron by Business Segment in 2012
- EBITDA of Valves & Measurement Business of Cameron, 2009-2012
- Revenue Breakdown of Cameron by Region, 2009-2012
- Key Financial Indicators of Kitz, 2009-2012
- Proportion of Business Segment in Kitz
- Sales of KITZ by Business Segment in 2012
- Net Sales and Revenue of Valve Manufacturing Business of Kitz, 2012-2015E

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

Choose type of format

- PDF (Single user license)2,000 USD
- Hard copy 2,100 USD
- PDF (Enterprisewide license)..... 3,200 USD

※ Reports will be dispatched immediately once full payment has been received.
Payment may be made by wire transfer or credit card via PayPal.