



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

**Aug. 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.

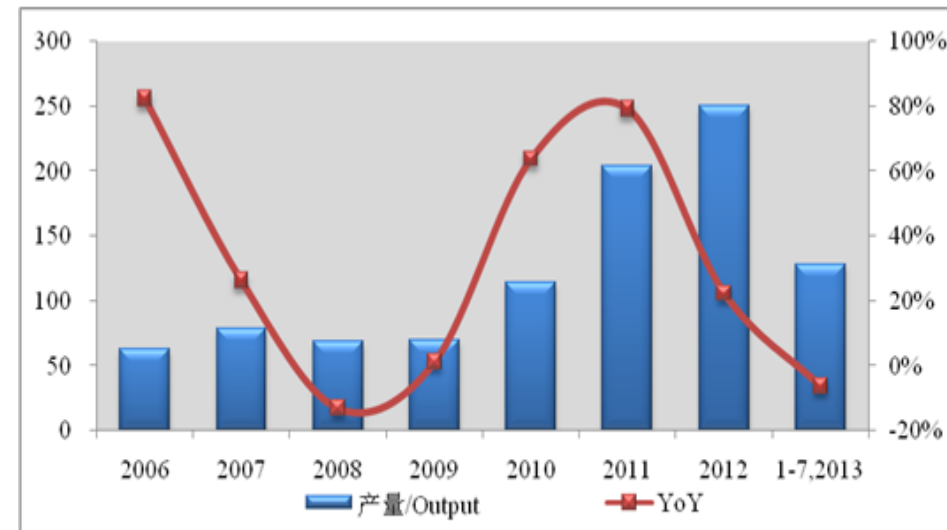
## Abstract

Affected by the sluggish global economy and Chinese construction machinery market, the market value of the global hydraulic industry reached USD32.7 billion in 2012, showing a year-on-year decline. China still lags behind the United States to take the world's second place.

In 2010-2011, China's hydraulic parts output witnessed the explosive year-on-year growth rate of more than 60% due to the large-scale investment. In 2012, the decreasing downstream demand led to a substantial slowdown in the growth of Chinese hydraulic components output which dropped to 250 million. 86.12% of China's hydraulic output was highly concentrated in Zhejiang, Jiangxi, Sichuan, Jiangsu and Anhui.

Currently, most Chinese hydraulic enterprises focus on the production of mid- and low-end hydraulic products with a low concentration degree, while high-end hydraulic parts are mainly imported. Therefore, key Chinese construction machinery enterprises and hydraulic manufacturers are planning R & D and production of high-end hydraulic products.

**Output and YoY Growth Rate of Hydraulic Components in China, 2006-2013 (Unit: mln)**



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

The report mainly studies market size, regional distribution, import, export and downstream industries of the global and China hydraulic industry. In addition, it analyzes the operation of seven world-renowned hydraulic manufacturers and 15 Chinese enterprises in depth.

As a major Chinese hydraulic manufacturing and R & D enterprise, Hengli Highpressure Oil Cylinder has accelerated the adjustment of the product structure and the overseas expansion in recent years. In 2013, the company's 25,000 t / a high precision hydraulic casting project went into operation; meanwhile, it plans to establish Changzhou Lixin, and build production bases of hydraulic valves and pumps by stages. In addition to signing continuous supply agreements with Caterpillar, Japan's Kobe Steel and other clients, the company intends to set up a wholly-owned subsidiary in Japan.

Zhongchuan Hydraulic is involved in the high-end hydraulic parts market. With the total investment of RMB2.6 billion, the company plans to realize the 600,000 sets / a high-end hydraulic products project by stages, in which Phase I was put into operation in October 2011. The company's "AP4V0112TVN hydraulic axial piston pumps, AP4V0112TE hydraulic axial piston pumps, MA170W rotary motors, VM28PF main valves" and other high-end hydraulic products were authenticated by the state in August 2012 and will be produced in large scale gradually.

Avic Liyuan Hydraulic put its new and expansion projects into operation in 2012, so that its product capacity has increased significantly. Meanwhile, the company has launched a small batch of vertebral plunger products, closed hydraulic pumps and other high-end products; the joint venture Lirui Hydraulic has completed the construction of high-pressure piston pump / motor production lines which have been put into operation now.

### 1 Overview of Hydraulic Industry

- 1.1 Related Concept
- 1.2 Industry Policy

### 2 Development of Hydraulic Industry

- 2.1 Global
  - 2.1.1 Market Size
  - 2.1.2 Regional Structure
- 2.2 China
  - 2.2.1 Output
  - 2.2.2 Geographical Distribution
  - 2.2.3 Market Size
- 2.3 Import and Export
- 2.4 Competition
  - 2.4.1 Major Global Enterprises
  - 2.4.2 Competition Characteristics of Chinese Market
- 2.5 Downstream
  - 2.5.1 Downstream Industry
  - 2.5.2 Investment of Main Engine Enterprises

### 3 Major Foreign-funded Enterprises

- 3.1 Bosch-Rexroth
  - 3.1.1 Profile
  - 3.1.2 Operation
  - 3.1.3 Revenue Structure
  - 3.1.4 R & D
  - 3.1.5 Development in China
  - 3.1.6 Bosch Rexroth (Changzhou) Co., Ltd.

- 3.2 Eaton
  - 3.2.1 Profile
  - 3.2.2 Operation
  - 3.2.3 Revenue Structure
  - 3.2.4 Corporate Acquisition
  - 3.2.5 Hydraulic Business
  - 3.2.6 Hydraulic Business in China
- 3.3 Parker Hannifin
- 3.4 Kawasaki Precision Machinery Ltd./KPM
- 3.5 KYB
  - 3.5.1 Profile
  - 3.5.2 Operation
  - 3.5.3 Revenue Structure
  - 3.5.4 R & D
  - 3.5.5 Hydraulic Components Business
  - 3.5.6 Business in China
  - 3.5.7 KYB Industrial Machinery (Zhenjiang) Ltd.
- 3.6 YUKEN
- 3.7 Nabtesco
  - 3.7.1 Profile
  - 3.7.2 Operation
  - 3.7.3 Revenue Structure
  - 3.7.4 Aviation and Hydraulic Machinery Business
  - 3.7.5 Business in China
  - 3.7.6 Shanghai Nabtesco Hydraulic Co., Ltd.
  - 3.7.7 Jiangsu Nabtesco Hydraulic Co., Ltd.

### 4 Major Chinese Hydraulic Enterprises

- 4.1 Hengli Highpressure Oil Cylinder (601100)
  - 4.1.1 Profile
  - 4.1.2 Operation
  - 4.1.3 Revenue Structure
  - 4.1.4 Gross Margin
  - 4.1.5 Output and Sales Volume
  - 4.1.6 R & D and Investment
  - 4.1.7 Clients
  - 4.1.8 Development Prospect
- 4.2 Shandong Taifeng Hydraulic Co., Ltd.
- 4.3 Yuci Hydraulics Group Corporation
- 4.4 Taiyuan Heavy Machinery Group Yuci Hydraulics Company Limited
- 4.5 Avic Liyuan Hydraulic Co., Ltd.
- 4.6 Sunbun Hydraulic
- 4.7 Zhejiang Stronger Hydraulic Co., Ltd.
- 4.8 Shandong Zhongchuan Hydraulic Co., Ltd.
- 4.9 Beijing Huade Hydraulic Industrial Group Co., Ltd.
- 4.10 Haimen Hydraulic Component Plant Co., Ltd.
- 4.11 Sichuan Changjiang Hydraulic Parts Co., Ltd.
- 4.12 Xuzhou Hydraulic Component Factory Co., Ltd.
- 4.13 Ningbo Wide Sky SKS Hydraulic Co., Ltd.
- 4.14 Shandong Longyuan Hydraulic Technology Co., Ltd.
- 4.15 Jiangsu Guorui Hydraulic Pressure Machine Co., Ltd.

- Structure of Hydraulic System
- Relevant Policies in China Hydraulic Industry
- Market Scale of Global Hydraulic Industry, 2000-2013E
- Sales Structure of Global Hydraulic Industry (by Country / Region), 2011
- Output and YoY Growth Rate of Hydraulic Components in China, 2006-2013
- Output Structure of Hydraulic Components in China by Region, 2012
- Output Value of China Hydraulic Industry, 2006-2015E
- Sales Structure of Hydraulic System Products in China
- Import and Export Value of Hydraulic Components in China, 2005-2012
- Key Hydraulic Enterprises and Their Sales in the World, 2012
- Application Structure of Hydraulic Components in China
- Sales of China Engineering Machinery Industry, 2005-2015E
- Investment of Chinese Engineering Machinery Main Engine Enterprises in Hydraulic Industry, 2008-2012
- Revenue and YoY Growth Rate of Bosch-Rexroth, 2004-2012
- Revenue Breakdown and Percentage of Bosch-Rexroth (by Region), 2011-2012
- R&D Costs and % of Total Revenue of Bosch-Rexroth, 2004-2012
- Net Revenue and Net Income of Eaton, 2007-2013
- Revenue Breakdown and Percentage of Eaton (by Business), 2010-2012
- Revenue Breakdown and Percentage of Eaton (by Region), 2009-2012
- Enterprises Acquired by Eaton, 2012
- Revenue and Operating Profit of Eaton's Hydraulic Business, 2009-2013
- Plant Distribution of Parker Hannifin (by Region / Business)
- Net Revenue and Net Income of Parker Hannifin, FY2007-FY2013
- Revenue Breakdown and Percentage of Parker Hannifin (by Business), FY2010-FY2013

- Revenue of Parker Hannifin (by Region), FY2010-FY2012
- Global Production Bases of Kawasaki Precision Machinery
- Revenue and Operating Profit of Kawasaki Precision Machinery, FY2010-FY2012
- Net Revenue and Net Income of KYB, FY2004-FY2013
- Revenue (by Business) of KYB, FY2010-FY2012
- Net Revenue and Percentage of KYB (by Region), FY2010-FY2011
- R&D Costs and % of Total Revenue of KYB, FY2006-FY2012
- Main Hydraulic Component Products of KYB, 2013
- Revenue and Operating Profit of KYB's Hydraulic Components Business, FY2009-FY2012
- External Net Sales Percentage of KYB's Hydraulic Components Business (by Purpose), FY2012
- Net Revenue and Percentage of KYB's Industrial Hydraulic Components (by Product), FY2010-FY2011
- New Hydraulic Subsidiaries of KYB, 2013
- New and Ongoing Hydraulic Components Projects of KYB, FY2012-FY2013
- Wholly-owned Subsidiaries of KYB in China, 2013
- Net Revenue and Operating Profit of KYB Industrial Machinery (Zhenjiang), FY2010-FY2012
- Cylinder Output of KYB Industrial Machinery (Zhenjiang), FY2011-FY2013
- Revenue and Net Income of Japan Yuken, FY2010-FY2013Q1
- Subsidiaries of Japan Yuken in China
- Revenue and Net Income of Nabtesco, FY2008-FY2013
- Revenue and Operating Profit of Nabtesco (by Product), FY2008-FY2013
- Net Revenue and Percentage of Nabtesco (by Region), FY2008-FY2013Q1
- Main Products and Major Clients of Nabtesco's Aviation and Hydraulic Machinery Business, 2013
- Revenue Percentage of Nabtesco's Aviation and Hydraulic Machinery Business (by Product), FY2011-FY2012
- Nabtesco's Market Share in Excavator Hydraulic Products, 2011
- Net Revenue and Percentage of Nabtesco in China, FY2010-FY2012

- Shareholding Structure of Shanghai Nabtesco Hydraulic
- Revenue and Net Income of Hengli Highpressure Oil Cylinder, 2008-2013
- Revenue of Hengli Highpressure Oil Cylinder (by Product), 2008-2012
- Revenue of Hengli Highpressure Oil Cylinder (by Region), 2008-2012
- Gross Margin of Hengli Highpressure Oil Cylinder (by Product), 2008-2012
- Capacity of Hengli Highpressure Oil Cylinder (by Product), 2008-2013E
- Output and Sales Volume of Hengli Highpressure Oil Cylinder (by Product), 2008-2012
- R&D Costs and % of Total Revenue of Hengli Highpressure Oil Cylinder, 2008-2012
- Name list and Revenue Contribution of Top 5 Clients of Hengli Highpressure Oil Cylinder, 2011-2012
- Revenue and Net Income of Hengli Highpressure Oil Cylinder, 2011-2015E
- Revenue and Net Income of Shandong Taifeng Hydraulic, 2009-2011
- Revenue of Shandong Taifeng Hydraulic (by Product), 2009-2011
- Cartridge Valve Sales Volume and Average Unit Price of Shandong Taifeng Hydraulic, 2009-2011
- Gross Margin of Shandong Taifeng Hydraulic (by Product), 2009-2011
- Member Companies of Yuci Hydraulics Group Corporation
- Industrial Structure and Production Bases of Avic Liyuan Hydraulic
- Sales and Net Income of Avic Liyuan Hydraulic, 2009-2012
- Development Course of Sunbun Hydraulic
- Operating Revenue and Net Income of Beijing Huade Hydraulic, 2010-2012
- Hydraulic Components Output of Beijing Huade Hydraulic, 2009-2012
- Revenue and Net Income of Xuzhou Hydraulic Component Factory, 2007-2012



**You can place your order in the following alternative ways:**

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

<b>Party A:</b>			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

<b>Party B:</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) .....1,800 USD
- Hard copy ..... 1,900 USD
- PDF (Enterprisewide license)..... 2,800 USD

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

### About ResearchInChina

ResearchInChina ([www.researchinchina.com](http://www.researchinchina.com)) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

### Our Major Activities

- *Multi-users market reports*
- *Database-RICDB*
- *Custom Research*
- *Company Search*

**RICDB** (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at [www.researchinchina.com](http://www.researchinchina.com)

For any problems, please contact our service team at: