



**China Hydraulic Support Industry Report,
2013-2016**

Dec. 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

Chinese coal mine machinery industry took to hydraulic support research and development from the late 1960s, and introduced dozens of sets of hydraulic supports from the United Kingdom, Germany, Poland and the former Soviet Union in the 70s; after the trial use, imitation and lessons learned, the development and application of hydraulic support gained rapid development in the 1980s, accompanied by successive development and production of over 20 different specifications of hydraulic supports embracing TD series, ZY series and ZZ series.

Among fully-mechanized coal mining equipment, hydraulic support is the product with the largest number and investment. In recent years, China's hydraulic support production and sales have been growing fast. In 2012 hydraulic support market size reached RMB26.78 billion, with compound annual growth rate in 2006-2012 up to 23.7%.



For now, there exist more than 110 manufacturers of hydraulic support in China. As fully-mechanized coal mining hydraulic support pertains to specialized product, including high-end products with a high degree of specialization, although there have been many companies involved in hydraulic support market over recent two years, it poses no threat to large coal mine machinery firms mainly engaged in the production of mid to high-end products, the industry competition structure basically remains stable. In 2012 Zhengzhou Coal Mining Machinery Group Company Limited, ChinaCoal Beijing Coal Mining Machinery Co., Ltd. and Pingdingshan Coal Mine Machinery Co., Ltd. as the top three enterprises in the Chinese hydraulic support market captured 45.5% market share; especially Zhengzhou Coal Mining Machinery Group Company Limited occupied more than 60% in the high-end market.

Zhengzhou Coal Mining Machinery Group Company Limited is the leading enterprise in China's fully-mechanized coal mining hydraulic support, but also the birthplace of China's first hydraulic support and the World's first caving hydraulic support. In 2012 it produced 21,786 hydraulic supports, achieving sales of RMB7.28 billion. In 2009-2012 hydraulic support production and sales grew at average annual growth rates of 25.2% and 23.7%, respectively.

China Hydraulic Support Industry Report, 2013-2016 of ResearchInChina mainly covers the following content:

- ※ Development environment for China hydraulic support industry, including policy environment, coal mine machinery market development, coal mine machinery industry pattern and demand, etc.;
- ※ Development status, market supply and demand, competition pattern and development tendency of China hydraulic support industry;
- ※ Operation, hydraulic support business, etc. of key companies (such as Zhengzhou Coal Mining Machinery Group Company Limited, Shandong Mining Machinery Group Co., Ltd, Linzhou Heavy Machinery Group Co., Ltd, Tiandi Science & Technology Co., Ltd, Sany Heavy Equipment International Holdings Co., Ltd., ChinaCoal Beijing Coal Mining Machinery Co., Ltd., Pingdingshan Coal Mine Machinery Co., Ltd., Shanxi Pingyang Industry Machinery Co., Ltd.);
- ※ Market size, supply-demand analysis and forecasting, etc. of China hydraulic support industry in 2013-2016.

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