



# **China Non-standard Special Material Equipment Industry Report, 2013-2016**

**Feb. 2014**

## 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 non-standard pressure vessel enterprises converge in the Yangtze River Delta and the Northeastern regions, wherein the former harbors numerous enterprises and the market there (apart from few time-honored SMEs (State-owned Enterprises) like SINOPEC Nanjing Chemical Industrial Co., Ltd Chemical Machinery Works) is dominated by private businesses represented by Zhangjiagang Chemical Machinery, Shanghai Morimatsu, Jiangsu Liyang Yunlong Group Company, Sunpower Group, Ningbo Mingxin Chemical Machinery, Ningbo Tiany Petrochemical Heavy Equipment Manufacturing Company, etc and foreign corporations, while in the Northeastern regions such time-honored SMEs play a leading role in the market as China First Heavy Industries, Dalian Jinzhou Heavy Machinery Company Limited, AVIC Liming Jinxi Chemical Machinery (Group) and Fushun Machinery Equipment Plant. Over the recent years, a great many powerful enterprises has mushroomed in Bohai Rim regions, consisting of Shenyang Paisi Titanium Equipment Co., Ltd, Liaoning New Huayang Weiye Equipment Manufacturing Co., Ltd, Shenyang Dongfang Titanium Co., Ltd, and so forth.

China is the largest producer of non-standard pressure vessel around the globe, ranking first worldwide whether in terms of the number of industrial players, the output of products or the output value. During 2005-2012, Chinese non-standard pressure vessel market demand presented an AAGR of 26.75%. The market demand in 2013 approximated RMB86.3 billion. In the forthcoming several years, the non-standard pressure vessel market of China will still maintain steady growth in scale.

According to the 12th Five-year Plan (2011-2015) for the Development of China Coal Chemical Industry, a great number of projects proposed and to be newly built in chemical and metallurgical sectors, etc will start construction successively in the next few years. In accordance with the industrial arrangement of 4:6 for special materials to stainless steel in the chemical and metallurgical special equipment domains in the developed countries, China's non-standard special material equipment still enjoys the room for a rise of at least RMB1 billion to RMB1.5 billion per annum in such fields as anti-corrosion, pressure resistance and high-temperature resistance.

China Non-standard Special Material Equipment Industry Report, 2013-2016 by ResearchInChina sheds light on the aspects below:

- ✘ Development history, market size analysis, etc of global non-standard special material equipment industry;
- ✘ Analysis on the development (industrial policy and laws & regulations) of China non-standard special material equipment industry, etc.;
- ✘ Scale, structure, supply & demand, competitive landscape and otherwise of Chinese non-standard pressure vessel and non-standard pressure pipeline markets;
- ✘ Analysis on influences from upstream and downstream sectors on China non-standard special material equipment industry, etc.;
- ✘ Operation, development strategies and others of Major 14 Chinese non-standard special material equipment companies.

As a top enterprise in China non-standard pressure vessel industry, Zhangjiagang Chemical Machinery is primarily focused on the design and manufacturing of non-standard pressure vessel equipment which finds application in the arenas like petrochemical, coal chemical, alumina and paper making. In H1 2013, the overseas business orders of the company broke through RMB200 million and the single order valuing over RMB100 million from abroad was recorded for the first time. The company sees a growing brand popularity in the international market.

Sichuan Kexin Mechanical and Electrical Equipment Co.,Ltd is a professional equipment producer laying emphasis on the manufacturing of non-standard pressure vessels, with the hit products divided into three major categories, i.e., chemical equipment, nuclear power auxiliary equipment, and other equipments. In the first three quarters of 2013, the company's revenue surged by 13.6% YoY to RMB151 million, and the sales volume of non-standard pressure vessel reached 1,553 sets, a year-on-year decline of 15.3%.

## Three Manufacturing Centers of Non-standard Special Material Equipment and Leading Companies in China



### 1 Overview of Non-standard Special Material Equipment Industry

- 1.1 Product Definition
- 1.2 Industry Chain
- 1.3 Market Barriers
  - 1.3.1 Technology
  - 1.3.2 Non-standard Constitution
  - 1.3.3 Capital
  - 1.3.4 Production License

### 2 Development Environment of China Non-standard Special Material Equipment Industry

- 2.1 Global Industry Development Overview
- 2.2 Policy Climate

### 3 Status Quo of China Non-standard Special Material Equipment Industry

- 3.1 Development Overview
- 3.2 Market Size
  - 3.2.1 Pressure Vessel
  - 3.2.2 Pressure Pipeline
- 3.3 Competition Pattern

### 4 Development of Upstream and Downstream Industries

- 4.1 Upstream Sector
  - 4.1.1 Nonferrous Metal
  - 4.2.2 High-class Stainless Steel
  - 4.2.3 Metal Matrix Composites

### 4.2 Downstream Sector

- 4.2.1 Petrochemical
- 4.2.2 Fine Chemical
- 4.2.3 Coal Chemical
- 4.2.4 Metallurgy
- 4.2.5 Electric Power

### 5 Key Companies

- 5.1 China First Heavy Industries (CFHI)
  - 5.1.1 Profile
  - 5.1.2 Operation
  - 5.1.3 Revenue Structure
  - 5.1.4 Gross Margin
  - 5.1.5 Major Projects under Construction
  - 5.1.6 Anticipation and Outlook
- 5.2 China National Erzhong Group Co., Ltd
  - 5.2.1 Profile
  - 5.2.2 Operation
  - 5.2.3 Revenue Structure
  - 5.2.4 Gross Margin
  - 5.2.5 Anticipation and Outlook
- 5.3 Sunpower Group
  - 5.3.1 Profile
  - 5.3.2 Operation
- 5.4 Zhangjiagang Chemical Machinery
  - 5.4.1 Profile
  - 5.4.2 Operation

### 5.4.3 Revenue Structure

### 5.4.4 Gross Margin

### 5.4.5 Performance Forecast

### 5.5 Sichuan Kexin Mechanical and Electrical Equipment Co., Ltd

### 5.5.1 Profile

### 5.5.2 Operation

### 5.5.3 Revenue Structure

### 5.5.4 Gross Margin

### 5.5.5 Performance Forecast for 2012-2014

### 5.6 Nanjing Baose Co., Ltd

### 5.7 Nanjing Special Metal Equipment Co., Ltd

### 5.8 Shanghai Morimatsu

### 5.9 Northwest Institute For Non-ferrous Metal Research

### 5.10 Shenyang Dongfang Titanium Co., Ltd

### 5.10.1 Profile

### 5.10.2 Operation

### 5.11 Liaoning New Huayang Weiye Equipment Manufacturing Co., Ltd

### 5.12 Shenyang Paisi Titanium Equipment Co., Ltd

### 6 Summary and Prediction

### 6.1 Industry

### 6.2 Enterprise

- 
- Structural Diagram of Non-standard Special Material Equipment Industry Chain
  - Development Course of Global Non-standard Special Material Equipment Industry
  - Scale and Forecast of Global Market Demand for Non-standard Special Material Equipment, 2006-2016E
  - Main Laws and Regulations on China Non-standard Special Material Equipment Industry
  - Main Industrial Policies on China Non-standard Special Material Equipment Industry
  - China Non-standard Pressure Vessel Market Size, 2006-2016E
  - Leading Chinese Non-standard Pressure Vessel Enterprises and Their Market Shares, 2012
  - China Non-standard Pressure Vessel (by Materials) Market Structure, 2006-2010
  - China Non-standard Special Material Pressure Vessel Market Size, 2006-2016E
  - Metal Welding Pressure Pipeline Market Size in China, 2006-2016E
  - Special Material Pressure Pipeline Market Size in China, 2006-2016E
  - Metal Welding Pressure Pipeline (by Materials) Market Structure in China, 2006-2010
  - Number of Manufacturers with ASME Permits in China, 2004-2011
  - Main Clusters (Regions) and Typical Enterprises in China Non-standard Special Material Equipment Industry
  - Copper Spot Prices in China, 2006-2013
  - Nickel Spot Prices of Shanghai Materials Trading, 2009-2013
  - Price of Titanium Sponge ( $\geq 99.6\%$ ) in China, 2005-2013
  - Zirconium Sponge ( $\geq 99\%$ ) Prices in China, 2005-2013
  - Key Applications of Non-standard Special Material Equipment
  - Total Output Value of China Petrochemical Industry, 2006-2016E
  - Output of Major Coal Chemicals in China, 2010-2020E
  - Output of Ten Nonferrous Metals in China, 2006-2016E
  - Thermal Power Generation in China, 2006-2013
  - Nuclear Power Generation in China, 2006-2013
  - Revenue and Net Income of China First Heavy Industries, 2008-2013



- 
- Revenue Structure of China First Heavy Industries by Products, 2009-2013
  - Revenue and Revenue Percentage of China First Heavy Industries by Regions, 2010-2013
  - Gross Margin of China First Heavy Industries by Products, 2011-2013
  - Under-construction Projects of China First Heavy Industries, 2013
  - Revenue and Net Income of China First Heavy Industries, 2013-2016E
  - Revenue and Net Income of China National Erzhong Group, 2009-2013
  - Revenue Breakdown of China National Erzhong Group by Products, 2012-2013
  - Revenue Breakdown of China National Erzhong Group by Regions, 2010-2013
  - Gross Margin of China National Erzhong Group by Products, 2012-2013
  - Revenue and Net Income of China National Erzhong Group, 2013-2016E
  - Revenue and Net Income of Sunpower Group, 2007-2012
  - Revenue Structure of Sunpower Group, 2010-2011
  - Revenue and Net Income of Zhangjiagang Chemical Machinery, 2008-2013
  - Revenue Breakdown of Zhangjiagang Chemical Machinery by Products, 2011-2013
  - Gross Margin of Zhangjiagang Chemical Machinery by Products, 2011-2013
  - Revenue and Net Income of Zhangjiagang Chemical Machinery, 2013-2016E
  - Revenue and Net Income of Sichuan Kexin Mechanical and Electrical Equipment, 2009-2013
  - Revenue Breakdown of Sichuan Kexin Mechanical and Electrical Equipment by Products, 2009-2013
  - Revenue Breakdown of Sichuan Kexin Mechanical and Electrical Equipment by Regions, 2009-2013
  - Gross Margin of Sichuan Kexin Mechanical and Electrical Equipment, 2009-2013
  - Gross Margin of Sichuan Kexin Mechanical and Electrical Equipment by Products, 2009-2013
  - Revenue and Net Income of Sichuan Kexin Mechanical and Electrical Equipment, 2013-2016E
  - Pressure Vessel Output & Sales Volume and Sales Revenue of Nanjing Baose, 2009-2011
  - Output, Sales Volume and Revenue of Pipeline Fittings of Nanjin Baose, 2009-2011
  - Revenue and Net Income of Nanjing Baose, 2009-2011



- 
- Major Downstream Customers of Nanjing Baose
  - Metal Pressure Vessel Output & Sales Volume and Production-sales Ratio of Nanjing Special Metal Equipment, 2008-2011
  - Revenue and Net Income of Nanjing Special Metal Equipment, 2008-2011
  - Product Distribution Fields and Typical Clients of Morimatsu (China)
  - Revenue and Total Profits of Main Subsidiaries under Morimatsu (China), 2009
  - Overall Revenue of Northwest Institute For Non-ferrous Metal Research, 2007-2011
  - Revenue and Net Income of Western Metal Materials, 2008-2012
  - Revenue of Shenyang Dongfang Titanium Co., Ltd, 2004-2009
  - Revenue of Shenyang Paisi Titanium Equipment, 2004-2009
  - Gross Margins of Leading Non-standard Special Material Equipment Enterprises in China, 2009-2013
  - Production and Sales Models of Leading Non-standard Special Material Equipment Enterprises in China

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