

**Global and China Hydraulic Industry
Report, 2014-2017**

Oct. 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

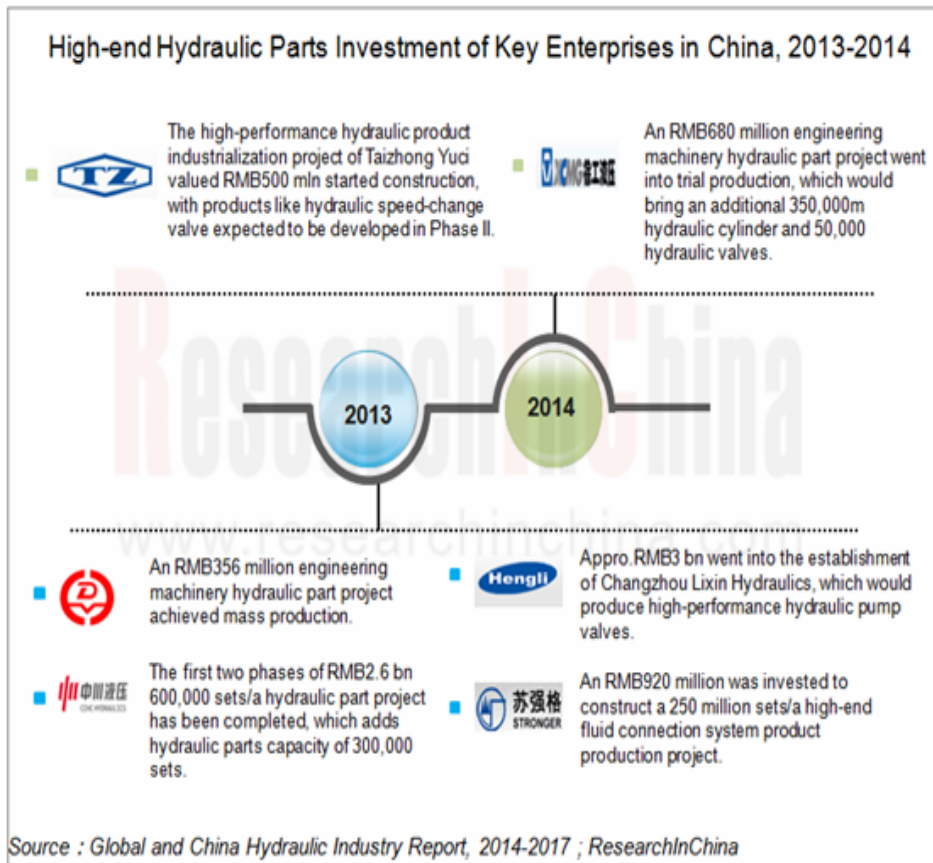
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Hydraulic parts are the crucial basic components to modern equipment manufacturing and widely used in the fields such as construction machinery, metallurgical machinery, plastic machinery, aerospace, machine tool and agricultural machinery. In 2013, the world's hydraulic industry sales approached USD34 billion, of which China swept over 30% shares and ranked second worldwide.

Although with a certain scale, China hydraulic industry may be well bigger but not stronger, with heavy reliance on importing high-end hydraulic products like medium and large excavator hydraulic parts. In 2011, China's import value of hydraulic parts was up to USD3.42 billion, being close to 50% of output value of hydraulic industry in the same year; wherein, about 70% of import value came from construction machinery hydraulic parts. Affected by the weak downstream demand over recent years, China's import of hydraulic parts has fallen, with the import value just reaching about USD2.5 billion in 2013 but still with heavy reliance on high-end imports.

To promote the R&D and production of crucial components like hydraulic parts, China gives policy and capital incentives on the one hand and actively builds a platform between main engine and supporting side on the other hand.



Spurred by this, professional Chinese hydraulic producers, construction machinery (main engine) enterprises, etc have been aggressively involved in the research and manufacturing of top-grade hydraulic parts over the recent years. In particular, the companies such as Hengli Highpressure Oil Cylinder, Shandong Zhongchuan Hydraulic, AVIC Liyuan Hydraulic, and Taiyuan Heavy Machinery Group Yuci Hydraulics have been the producers of high-end hydraulic products.

Hengli Highpressure Oil Cylinder: as one of a few local producers of high pressure and ultra high pressure oil cylinders used for excavators, the company invested approximately RMB3 billion to set up Jiangsu Hengli Hydraulic Co., Ltd which mainly produces high-performance hydraulic pump valves. Once the project's first-stage puts into production, the company will annually increase 20,000 high pressure plunger pumps used for excavators, 20,000 multiway valves, 1.99 million universal high-performance hydraulic control valves, and 10,000 electrohydraulic proportional servo valves.

Shandong Zhongchuan Hydraulic: founded in 2010 and as the subsidiary of Shandong Changlin Group, Shandong Zhongchuan Hydraulic now has been capable of annually producing 300,000 sets of top-grade main hydraulic components. Whilst expanding production capacity, the company is actively speeding up independent research and development. In August, 2012, the company's four models of top-grade hydraulic products including AP4V0112TVN hydraulic axial piston pump, AP4V0112TE hydraulic axial piston pump, MA170W rotary motor, and VM28PF master valve passed the state-level appraisal.

Besides, Kawasaki Precision Machinery, KYB and other foreign players are also accelerating their business growth in China.

Kawasaki Precision Machinery: it is the largest supplier of hydraulic excavator parts in China. In 2005, it established Kawasaki Precision Machinery (Suzhou) Co., Ltd which mainly produces the hydraulic pumps and hydraulic motors used for excavator; then in 2009 it set up Kawasaki Chunhui Precision Machinery (Zhejiang) Co., Ltd with the first-stage production of 12,000 hydraulic pumps and with the hydraulic motor and control valve production to be raised along with scale expansion.

KYB: Its sales hit JPY352.71 billion in FY2013, of which sales in China accounted for 7.3%. According to its development planning, KYB will speed up the development of mini and small excavator hydraulic parts market in China in the next three years and at the same time actively explore the Chinese market of hydraulic parts for railways and agricultural machinery.

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Global and China Hydraulic Industry Report, 2014-2017 by ResearchInChina highlights the following:

- ⇒ Global hydraulic industry scale, regional pattern, corporate pattern, etc.;
- ⇒ Policies on Chinese hydraulic industry, status quo of the industry, existing problems in the industry, etc.;
- ⇒ Production, sales, import and export of hydraulic parts in China, status quo of construction machinery hydraulic parts, etc.;
- ⇒ Operation, business in China, etc of world' s seven leading companies;
- ⇒ Operation, revenue structure, development strategies, etc of sixteen Chinese companies.

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