

**Global and China Valve Industry  
Report, 2014-2018**

**Nov. 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.

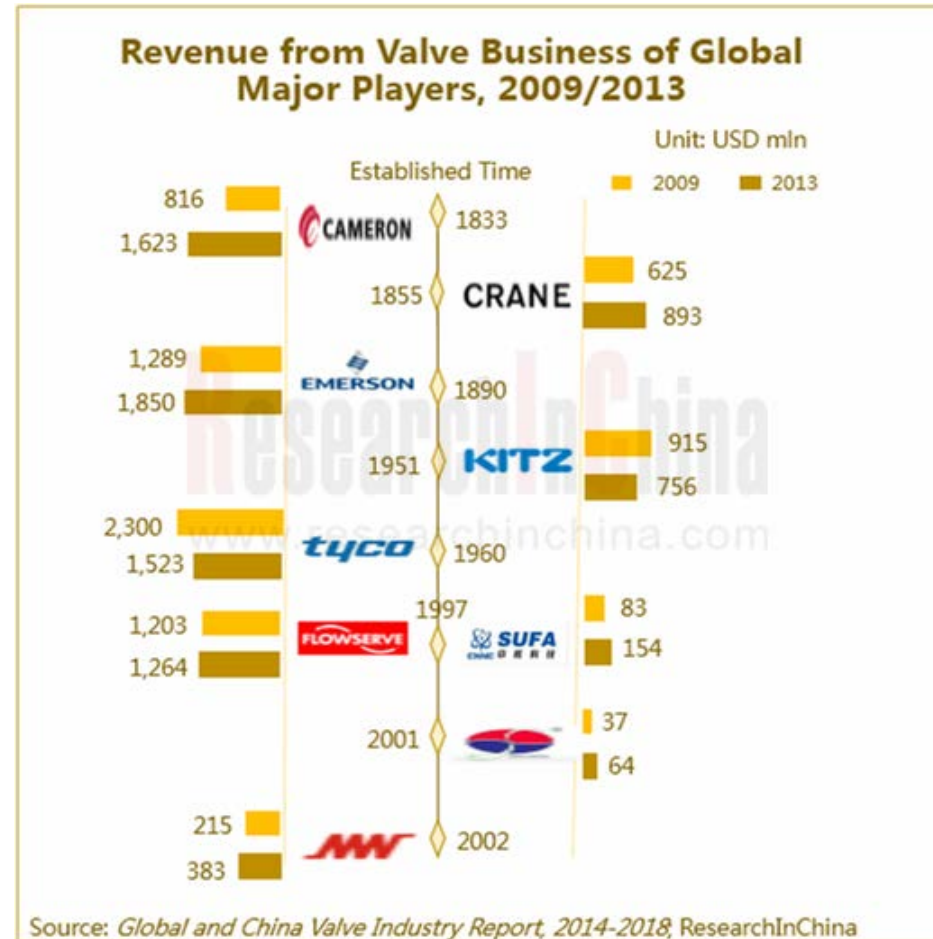
## Abstract

Valve as one of the key devices in flow control system is principally applied in petroleum & gas, energy & power and chemical areas. Subject to slackening economic growth and weakening downstream demand around the globe, sales of valve industry worldwide posted a CAGR of merely 3.3% during 2008-2013.

The global valve production bases are gradually being transferred to China from the 1990s onwards. In 2008-2013, sales of China's valve industry grew at a CAGR of 7.3%, significantly higher than that of the globe, and expected to hit USD8.79 billion in 2014.

Under the influence of nuclear power restart in 2014, China's nuclear power valve market has seen a gradual pickup. It is estimated that the investment in nuclear power valve in the country will fly to RMB9.5 billion in 2015. Globe valve, diaphragm valve and ball valve (three major fields of nuclear power valves) will usher rapid development, accordingly.

Besides, driven by policies e.g. old-for-new and energy efficient air-conditioner subsidy, the air conditioning valve market is rising steadily over the years. In 2013, market capacity of four-way valve and globe valve for air conditioner in China reached 110 million units and 220 million units separately, both up 6.7% over a year earlier.



Currently, global valve manufacturers such as Emerson, Pentair and KITZ are mainly concentrated in the United States, Japan and other developed countries. In China, there are mainly Neway Valve (Suzhou) Co., Ltd., CNNC Sufa Technology Industry, Inc. and so forth.

At the end of 2013, Emerson acquired Virgo Valves and Controls, Ltd., a leading manufacturer of ball valves and automation systems based in India which focuses on production of ball valves, high-performance butterfly valves, etc.

In August 2014, Pentair's safety valve steam test center in Qingpu production base, Shanghai was put into formal use, which would further expand the company's comprehensive abilities in production, assembling, marketing, commissioning, maintenance and repair in China.

As the largest valve producer in China, Neway Valve (Suzhou) Co., Ltd. was listed on the Shanghai Stock Exchange in January 2014, with funds raised of about RMB880 million used for 35,000 sets/a large-diameter valve and special valve project, 10,000 sets/a petroleum valve and equipment project, etc.

CNNC Sufa Technology Industry Co., Ltd. is a major nuclear power valve manufacturer in China, at the cutting edge of three generations of domestic nuclear power valves; now, it is accelerating R&D of isolating valve, squib valve and others for nuclear power stations. In the first half of 2014, its revenue from nuclear power valve and nuclear chemical valve reported 48.9% and 442.1% surges year on year respectively.

Global and China Valve Industry Report, 2014-2018 highlights the followings:

- Market size, market pattern, etc. of global valve industry;
- Development environment, market size, competitive landscape, import & export, etc. of China valve industry;
- Market capacity, market competition, etc. of major downstream applications of value;
- Operation, revenue structure, layout in China, etc. of 10 valve companies abroad;
- Operation, revenue structure, competitive edge, etc. of 12 Chinese valve manufacturers.

### **1 Introduction to Valve Industry**

- 1.1 Definition
- 1.2 Classification
- 1.3 Barriers to Entry

### **2 Global Valve Market**

- 2.1 Market Size
- 2.2 Market Pattern

### **3 China Valve Market**

- 3.1 Development Environment
- 3.2 Market Size
  - 3.2.1 Sales
  - 3.2.2 Output
- 3.3 Competitive Landscape
  - 3.3.1 Market Pattern
  - 3.3.2 Enterprise Pattern
- 3.4 Import & Export
  - 3.4.1 Import
  - 3.4.2 Export

### **4 Major Downstream Applications**

- 4.1 Petrochemical Valve
  - 4.1.1 Market Profile
  - 4.1.2 Localization Process
- 4.2 Nuclear Power Valve
  - 4.2.1 Types and Features

- 4.2.2 Market Capacity
- 4.2.3 Market Competition
- 4.2.4 Localization Process
- 4.3 Air Conditioning Valve
  - 4.3.1 Types
  - 4.3.2 Industry Characteristics
  - 4.3.3 Market Capacity
  - 4.3.4 Market Competition
- 4.4 Metallurgical Valve
  - 4.4.1 Types and Features
  - 4.4.2 Market Capacity
  - 4.4.3 Market Competition

### **5 Key Companies Abroad**

- 5.1 Pentair
  - 5.1.1 Profile
  - 5.1.2 Operation
  - 5.1.3 Revenue Structure
  - 5.1.4 Gross Margin
  - 5.1.5 Valve Business
  - 5.1.6 Pentair in China
- 5.2 Emerson
  - 5.2.1 Profile
  - 5.2.2 Operation
  - 5.2.3 Revenue Structure
  - 5.2.4 Valve Business
  - 5.2.5 Emerson in China
  - 5.2.6 Developments

- 5.3 Crane
  - 5.3.1 Profile
  - 5.3.2 Operation
  - 5.3.3 Revenue Structure
  - 5.3.4 Valve Business
  - 5.3.5 Crane in China
- 5.4 Flowserve
  - 5.4.1 Profile
  - 5.4.2 Operation
  - 5.4.3 Revenue Structure
  - 5.4.4 Valve Business
  - 5.4.5 Gross Margin
- 5.5 Cameron
  - 5.5.1 Profile
  - 5.5.2 Operation
  - 5.5.3 Revenue Structure
  - 5.5.4 Valve Business
  - 5.5.5 Cameron in China
- 5.6 KITZ
  - 5.6.1 Profile
  - 5.6.2 Operation
  - 5.6.3 Revenue Structure
  - 5.6.4 Valve Business
- 5.7 Others
  - 5.7.1 Rockwell International
  - 5.7.2 KBS
  - 5.7.3 Velan Engineering
  - 5.7.4 Tyco

### 6 Key Companies in China

#### 6.1 CNNC Sufa Technology Industry Co., Ltd.

##### 6.1.1 Profile

##### 6.1.2 Operation

##### 6.1.3 Revenue Structure

##### 6.1.4 Gross Margin

##### 6.1.5 Valve Business

##### 6.1.6 Developments

#### 6.2 Jiangsu Shentong Valve Co., Ltd.

##### 6.2.1 Profile

##### 6.2.2 Operation

##### 6.2.3 Revenue Structure

##### 6.2.4 Gross Margin

##### 6.2.5 Valve Business

#### 6.3 Zhejiang Sanhua Co., Ltd.

##### 6.3.1 Profile

##### 6.3.2 Operation

##### 6.3.3 Revenue Structure

##### 6.3.4 Valve Business

##### 6.3.5 Developments

#### 6.4 Zhejiang DunAn Artificial Environment Co., Ltd.

##### 6.4.1 Profile

##### 6.4.2 Operation

##### 6.4.3 Revenue Structure

##### 6.4.4 Gross Margin

##### 6.4.5 Valve Business

##### 6.4.6 Business Prospects

#### 6.5 China Valves Technology, Inc.

##### 6.5.1 Profile

##### 6.5.2 Operation

##### 6.5.3 Henan Kaifeng High Pressure Valve Co., Ltd.

##### 6.5.4 Zhengzhou City ZDValve Co., Ltd.

#### 6.6 Neway Valve (Suzhou) Co., Ltd.

##### 6.6.1 Profile

##### 6.6.2 Operation

##### 6.6.3 Revenue Structure

##### 6.6.4 Gross Margin

##### 6.6.5 Competitive Edge

##### 6.6.6 Valve Business

##### 6.6.7 Fundraising Projects

#### 6.7 Others

##### 6.7.1 Jiangnan Valve Co., Ltd.

##### 6.7.2 Yuanda Valve Group Co., Ltd.

##### 6.7.3 Zhejiang Petrochemical Valve Co., Ltd.

##### 6.7.4 Dalian DV Valve Co., Ltd.

##### 6.7.5 Zhejiang Chaoda Valve Co., Ltd.

##### 6.7.6 Lanzhou High Pressure Valve Co., Ltd.

### 7 Summary and Forecast

#### 7.1 Market

#### 7.2 Enterprise

- Valve Types
- Structure of Demand for Valves in China (by Type), 2013
- Sales of Valve Industry Worldwide, 2008-2018E
- Structure of Demand for Valves Worldwide (by Field), 2013
- Sales Structure of Valves Worldwide (by Region), 2013
- Growth Rate of GDP and Fixed Asset Investment in China, 2003-2014
- Sales of Valve Industry in China, 2008-2018E
- Output and Growth Rate of Valves in China, 2003-2018E
- Output of Valves in China (by Quarter), 2013
- Structure of Demand for Valves in China (by Field), 2013
- Output Structure of Valves in China (by Region), 2012-2014
- Revenue from Valve and % of Major Producers Worldwide, 2013
- Import Volume and YoY Growth Rate of Valves in China, 2003-2014
- Structure of Import Volume of Valves in China (by Region), 2013-2014
- Import Value and YoY Growth Rate of Valves in China, 2003-2014
- Structure of Import Value of Valves in China (by Region), 2013-2014
- Export Volume of Valves in China, 2011-2014
- Structure of Export Volume of Valves in China (by Region), 2013-2014
- Export Value and Growth Rate of Valves in China, 2004-2014
- Structure of Export Value of Valves in China (by Region), 2013-2014
- Research Priorities for Petrochemical Valve in China, 2015-2017
- Valve Products Applied in Nuclear Power Field (Partial)
- Configuration Structure of Nuclear Island Valves
- Structure of Demand for Nuclear Island Valves, 2013
- Proportion of Nuclear Power Generation in Major Countries, 2013



- Development Plan for China Nuclear Power Industry, 2010-2020
- Schematic Drawing for Investment Structure of Nuclear Power Station in China
- Investment in Nuclear Power Valve in China, 2015E & 2020E
- Leading Products of Major Nuclear Power Valve Manufacturers in China
- Market Capacity of Globe Valves and 4-way Valves for Air Conditioner in China, 2010-2015E
- Inverter Air Conditioner Sales Volume and Electronic Expansion Valve Consumption in China, 2012-2015E
- Competition Pattern of Major Enterprises of 4-way Valves for Air Conditioner Worldwide, 2012-2014
- Competition Pattern of Major Enterprises of Globe Valves for Air Conditioner Worldwide, 2012-2014
- Competition Pattern of Major Solenoid Valve Enterprises in China, 2012-2014
- Market Share of Electronic Expansion Valve in China, 2013
- Environment-friendly and Energy-efficient Valve Products Used in Metallurgy (Partial)
- Fixed Asset Investment and YoY Growth of China Iron & Steel Industry, 2011-2015E
- Demand for Iron and Steel in China, 2012-2013
- Market Capacity of Special Valves Needed for New Projects and Technology Upgrading Projects of China Iron and Steel Industry, 2010-2015E
- Major Metallurgical Valve Manufacturers in China
- Marketing Network of Pentair Worldwide
- Revenue and Net Income of Pentair, 2008-2013
- Revenue Structure of Pentair (by Business), 2011-2013
- Revenue Breakdown of Pentair (by Region), 2011-2013
- Gross Profit and Gross Margin of Pentair, 2010-2013
- Marketing Network of Pentair in China
- Revenue and Net Income of Emerson, 2009-2014
- Revenue Structure of Emerson (by Business), 2011-2013
- Revenue Breakdown of Emerson (by Region), 2011-2013



- Revenue and Net Income of Crane, 2009-2014
- Revenue Structure of Crane (by Product), 2013-2014
- Revenue and Profit from Flow Control Business of Crane, 2009-2014
- Distribution of Major Flow Control Production Bases of Crane, 2013
- Revenue from Valve Business of Crane, 2009-2013
- Layout of Crane in China
- Marketing Network of Flowserve Worldwide
- Revenue and Net Income of Flowserve, 2009-2014
- Order Structure of Flowserve (by Industry), 2012-2014
- Revenue Structure of Flowserve (by Product), 2012-2014
- Revenue Structure of Flowserve (by Region), 2012-2014
- Major Financial Indicators of Flow Control Business of Flowserve, 2009-2014
- Gross Profit and Gross Margin of Flowserve, 2009-2014
- Marketing Network of Cameron Worldwide
- Revenue and Net Income of Cameron, 2009-2014
- Revenue Structure of Cameron (by Business), 2012-2014
- Revenue Breakdown of Cameron (by Region), 2009-2014
- Revenue from Valve & Measurement Business of Cameron, 2008-2014
- Layout of Cameron in China
- Marketing Network of KITZ Worldwide
- Revenue and Net Income of KITZ, FY2009-FY2014
- Revenue Structure of KITZ (by Business), FY2012-FY2014
- Revenue from Valve Business of KITZ, FY2012-FY2014
- Major Valve Production Bases of KITZ
- Layout of KBS in China

- Marketing Network of Velan Worldwide
- Marketing Network of CNNC Sufa Technology Industry Worldwide
- Revenue and Net Income of CNNC Sufa Technology Industry, 2009-2014
- Revenue Structure of CNNC Sufa Technology Industry (by Product), 2009-2014
- Revenue Structure of CNNC Sufa Technology Industry (by Region), 2009-2014
- Gross Margin of CNNC Sufa Technology Industry (by Product), 2009-2014
- Value Output and Sales Volume of CNNC Sufa Technology Industry, 2012-2013
- Valve Revenue Structure of CNNC Sufa Technology Industry (by Region), 2012-2014
- Number of Employees in Jiangsu Shentong Valve, 2009-2013
- Revenue and Net Income of Jiangsu Shentong Valve, 2009-2014
- Revenue Structure of Jiangsu Shentong Valve (by Product), 2009-2014
- Revenue Structure of Jiangsu Shentong Valve (by Region), 2009-2014
- Gross Margin of Jiangsu Shentong Valve (by Product), 2009-2014
- Revenue from Major Valve Products of Jiangsu Shentong Valve, 2009-2014
- Valve Output Structure of Jiangsu Shentong Valve (by Field), 2012-2013
- Revenue and Net Income of Zhejiang Sanhua, 2009-2014
- Revenue Structure of Zhejiang Sanhua (by Product), 2009-2014
- Revenue Breakdown of Zhejiang Sanhua (by Region), 2009-2014
- Valve Revenue Structure of Zhejiang Sanhua (by Product), 2014
- Revenue and Net Income of DunAn Environment, 2009-2014
- Revenue Breakdown of DunAn Environment (by Product), 2012-2014
- Revenue Breakdown of DunAn Environment (by Region), 2011-2014
- Gross Margin of DunAn Environment (by Product), 2009-2014
- Major Production Bases of China Valves Technology
- Number of Employees in Neway Valve (Suzhou), 2010-2013

- Operating Revenue and Net Income of Neway Valve (Suzhou), 2009-2014
- Marketing Network of Neway Valve (Suzhou) Worldwide
- Revenue Structure of Neway Valve (Suzhou) (by Product), 2012-2014
- Revenue Breakdown of Neway Valve (Suzhou) (by Region), 2009-2014
- Revenue Structure of Neway Valve (Suzhou) (by Region), 2013-2014
- Gross Margin of Neway Valve (Suzhou) (by Product), 2010-2014
- Value Output and Sales Volume of Neway Valve (Suzhou) (by Product), 2012-2013
- Ongoing Projects of Neway Valve (Suzhou), 2014
- API 6A Values, Christmas Trees and Imported Installations of Neway Valve (Suzhou)
- Marketing Network of Dalian DV Valve Worldwide
- Revenue Growth Rate of Valves Worldwide and in China, 2008-2018E
- Valve Application Structure Worldwide and in China, 2013
- Import & Export Growth Rate of Valves in China, 2004-2013
- Revenue Growth Rate of Major Valve Producers Worldwide, 2010-2014
- Market Share of Major Valve Producers Worldwide, 2013

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