



**Global and China Hydraulic Industry
Report, 2017-2021**

Mar.2017

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 components to modern equipment manufacturing. The global hydraulic parts market size approximated USD35.2 billion in 2016, up about 2.6% year on year. Driven by the growth of global and Chinese machinery and equipment markets, the world's hydraulic parts market will continue to grow and may fetch USD46.6 billion by 2021.

China, the second largest hydraulic parts market around the globe, accounts for roughly 24% of the global hydraulic market scale. Due to the downturn of construction machinery and other major downstream industries, Chinese hydraulic parts market valued about RMB58 billion in 2016, down 0.5% year on year. The construction machinery industry showed obvious sign of recovery in early 2017; coupled with "Made in China 2025", China's Thirteenth Five-Year Plan for Intelligent Manufacturing, "the Belt and Road Initiatives" and other positive policies, Chinese hydraulic parts market will resume growth progressively, and is expected to garner RMB75.9 billion by 2021.

The China-made hydraulic parts has prevailed in the medium and low-end market domestically for a long time, while the high-end hydraulic parts market is monopolized by Kawasaki Precision Machinery, Eaton, Rexroth, Linde and other foreign-funded enterprises.

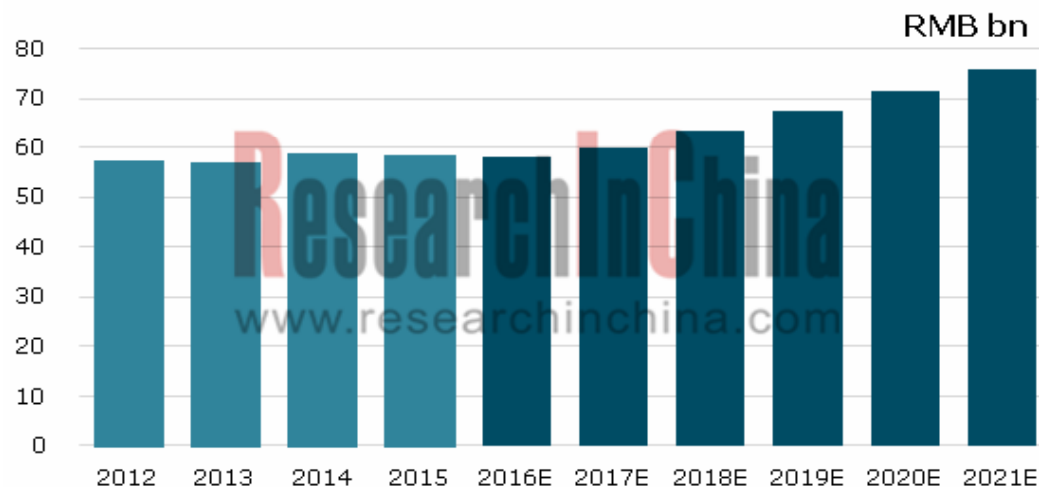
In order to break through the development bottleneck of domestic high-end hydraulic parts, China has introduced a number of policies. Hengli Hydraulic, Taiyuan Heavy Machinery Group Yuci Hydraulics, Huade Hydraulic and other local enterprises have speeded up their layout of high-end hydraulic parts through acquisitions, independent R & D and other approaches. In 2016, Hengli Hydraulic deployed high-end hydraulic pump valves by taking over HAWE Inline and set up a new factory in Changzhou city to achieve local production; meanwhile, Taiyuan Heavy Machinery Group Yuci Hydraulics started to build a new high-end hydraulic product (Jinan city of Shandong province) production & research base. As multiple high-end hydraulic parts projects go into operation, China will be able to produce about 60% of high-end hydraulic components and systems independently by 2021.

In addition to high-end hydraulic products, industry 4.0 and mechanical-electrical-hydraulic integration will become the hydraulic industry's main trends in the future under the impetus of the Internet, intellectualization and so forth.

Global and China Hydraulic Industry Report, 2017-2021 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, corporate pattern, etc.;
- ◆ Production, sales, import and export, price of hydraulic parts in China, status quo and trends of construction machinery hydraulic parts, etc.;
- ◆ Development of hydraulic cylinders, hydraulic pump valves, hydraulic hammers, etc. in China;
- ◆ Operation, development strategies, etc. of 23 global and Chinese key hydraulic enterprises.

Chinese Hydraulic Parts Market Size, 2012-2021



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1 Overview of Hydraulic Industry

- 1.1 Definition
- 1.2 Composition
- 1.3 Industrial Chain

2 Development of Global Hydraulic Industry

- 2.1 Market Size
- 2.2 Regional Structure
- 2.3 Key Players

3 Development of China Hydraulic Industry

- 3.1 Related Policies
- 3.2 Industry Scale
- 3.3 Main Problems
- 3.4 Corporate Pattern

4 Chinese Hydraulic Parts Market

- 4.1 Overview
- 4.2 Supply and Demand
 - 4.2.1 Production
 - 4.2.2 Marketing
 - 4.2.3 Import and Export
- 4.3 Price
- 4.4 Construction Machinery Hydraulic Parts Market
- 4.5 Trends

5 Hydraulic Parts Subdivision and Related Product Markets

- 5.1 Hydraulic Cylinder
 - 5.1.1 Market Size
 - 5.1.2 Corporate Pattern
- 5.2 Hydraulic Pump Valve
- 5.3 Hydraulic Hammer

6 Major Foreign Companies

- 6.1 Bosch-Rexroth
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Development in China
 - 6.1.4 Bosch Rexroth (Changzhou) Co., Ltd
- 6.2 Eaton
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Hydraulic Business
 - 6.2.4 Development in China
- 6.3 Parker Hannifin
 - 6.3.1 Profile
 - 6.3.2 Operation
 - 6.3.3 Hydraulic Business
 - 6.3.4 Development in China
- 6.4 Kawasaki Precision Machinery
 - 6.4.1 Profile
 - 6.4.2 Operation
 - 6.4.3 Hydraulic Components Business
 - 6.4.4 Kawasaki Precision Machinery (Suzhou)
- 6.5 KYB

- 6.5.1 Profile
- 6.5.2 Operation
- 6.5.3 Hydraulic Components Business
- 6.5.4 Development in China
- 6.6 YUKEN
 - 6.6.1 Profile
 - 6.6.2 Operation
 - 6.6.3 Development in China
- 6.7 Nabtesco
 - 6.7.1 Profile
 - 6.7.2 Operation
 - 6.7.3 Aviation and Hydraulic Machinery Business
 - 6.7.4 Development in China
 - 6.7.5 Shanghai Nabtesco Hydraulic Co., Ltd.
 - 6.7.6 Jiangsu Nabtesco Hydraulic Co., Ltd

7 Key Chinese Companies

- 7.1 Jiangsu Hengli Hydraulic Co., Ltd.
 - 7.1.1 Profile
 - 7.1.2 Operation
 - 7.1.3 Capacity, Output and Sales Volume
 - 7.1.4 Prospect
- 7.2 Yantai Eddie Precision Machinery Co., Ltd.
 - 7.2.1 Profile
 - 7.2.2 Operation
 - 7.2.3 Capacity, Output and Sales Volume
- 7.3 Shandong Taifeng Hydraulic Co., Ltd.
 - 7.3.1 Profile

- 7.3.2 Operation
- 7.3.3 Development Strategy
- 7.4 Yuci Hydraulics Group Corporation
 - 7.4.1 Yuci Hydraulics Co., Ltd.
 - 7.4.2 Changzhi Hydraulics Co., Ltd.
- 7.5 Taiyuan Heavy Machinery Group Yuci Hydraulics Co., Ltd.
 - 7.5.1 Profile
 - 7.5.2 Operation
- 7.6 AVIC Liyuan Hydraulic Co., Ltd.
 - 7.6.1 Profile
 - 7.6.2 Operation
- 7.7 Sunbun Hydraulic Co., Ltd
- 7.8 Zhejiang Stronger Hydraulic Co., Ltd.
 - 7.8.1 Profile
 - 7.8.2 Subsidiaries
- 7.9 Shandong Zhongchuan Hydraulic Co., Ltd.
 - 7.9.1 Profile
 - 7.9.2 Operation
- 7.10 Beijing Huade Hydraulic Industrial Group Co., Ltd.
 - 7.10.1 Profile
 - 7.10.2 Operation
- 7.11 XCMG Hydraulics Co., Ltd.
 - 7.11.1 Profile
 - 7.11.2 Operation
- 7.12 SKS Hydraulic Technology Co., Ltd.
- 7.13 Shandong Longyuan Hydraulic Technology Co., Ltd.
- 7.14 Jiangsu Guori Hydraulic Machinery Co., Ltd.
- 7.15 Zhejiang Haihong Hydraulic Technology Stock Co., Ltd.
- 7.16 Linde Hydraulics (China) Co., Ltd.

- Composition of Hydraulic System
- Hydraulic Industry Chain
- Main Applications of Industrial Hydraulic Products
- Global Hydraulic Industry Sales, 2008-2021E
- % of Global Hydraulic Industry Sales by Country/Region, 2008-2021E
- Major Global Suppliers of Hydraulic Parts
- Policies on Hydraulic Industry in China
- Output Value and YoY Growth of China Hydraulic Industry, 2006-2016
- R&D of High-end Hydraulic Parts in China, 2014-2017
- Construction of Hydraulic Industry Bases in China, 2017
- China-based Production Bases of the World's Major Hydraulic Companies
- High-end Hydraulic Part Projects of Major Hydraulic Companies in China, 2017
- Output of Hydraulic Parts and YoY Growth in China, 2007-2021E
- Output Structure of Hydraulic Parts in China by Region, 2013-2016
- Chinese Hydraulic Parts Market Capacity, 2011-2021E
- Application of Hydraulic Parts in China by Industry, 2016&2021E
- Hydraulic System Sales Structure in China, 2010&2021E
- China's Imports of Hydraulic Parts, 2011-2021E
- China's Exports of Hydraulic Parts, 2011-2021E
- Average Prices of Hydraulic Parts in China, 2007-2016
- Global Construction Machinery Sales by Region/Country, 2011-2015
- Sales and YoY Growth of China's Construction Machinery Industry, 2006-2021E
- Hydraulic Components Bases of Major Construction Machinery Companies in China, 2016
- Trends of Main Hydraulic Technologies in China
- Output Value and YoY Growth of China Hydraulic Industry, 2014-2021E

- Hydraulic Development Stages and Trends in China
- Global Hydraulic Excavator Market by Region, 2010-2017
- Application of Different Oil Pressure Cylinders
- Global Hydraulic Cylinder Market Size, 2008-2020E
- Excavator Sales in China, 2010-2021E
- Cost Structure of Hydraulic System in Excavator
- Major Suppliers of Oil Cylinders for Excavators and Supporting Relationship in China
- Performance Comparison of Common Hydraulic Pumps for Hydraulic System
- Hydraulic Pump Output and Sales in China, 2011-2021E
- Production and Sales of Hydraulic Pumps in China, 2011-2021E
- Chinese Hydraulic Spool Market Size, 2009-2018E
- Hydraulic Breaker Sales in China, 2006-2016
- % of Excavators with Breakers in China, 2006-2016
- Revenue and YoY Growth of Bosch-Rexroth, 2004-2016
- Revenue Structure of Bosch-Rexroth (by Region), 2011-2015
- R&D Costs and % of Total Revenue of Bosch-Rexroth, 2005-2015
- Net Revenue and Net Income of Eaton, 2007-2016
- Business Revenue Outlook of Eaton, 2017
- Gross Margin of Eaton (by Business), 2016-2020
- Net Revenue Structure of Eaton (by Business), 2011-2016
- Industrial Sector of Eaton, 2016
- Eaton's Industrial Sector Serves a Diverse Set of End Markets in 2016
- Net Revenue Structure of Eaton (by Region), 2010-2015
- Key Acquisition Business of Eaton before 2013
- Net Revenue and Operating Income of Eaton's Hydraulic Business, 2009-2016

- Eaton's Major Hydraulic Products and Revenue Structure (by Application), 2016
- Hydraulic Business Actions of Eaton, 2017
- Eaton's Hydraulic Project in Brazil, 2017
- Trends of Eaton's Hydraulic Products
- Eaton's Presence in China, 2016
- Eaton's Projects in China, 2017
- Distribution of Parker Hannifin's Plants (by Region/Business), FY2016
- Main Businesses of Parker Hannifin
- Net Revenue and Net Income of Parker Hannifin, FY2007-FY2017
- Parker Hannifin's Operating Margin Drivers to FY2020
- Revenue Structure of Parker Hannifin (by Business), FY2016
- Revenue Breakdown of Parker Hannifin (by Business), FY2010-FY2014
- Parker Hannifin's Unitized Hydrostatic Transmission (UHT)
- Hydraulic Revenue Percentage of Parker Hannifin's Aerospace Division, FY2016
- Revenue and Operating Income of Kawasaki, FY2009-FY2016
- Kawasaki's Production Bases Worldwide
- Kawasaki's Hydraulic Business Orders, Net Revenue and Operating Income, FY2016Q3
- Global Operations of KYB
- KYB's Net Revenue and Net Income, FY2007-FY2016
- AC Business Development Goal of KYB, 2020
- Revenue Breakdown of KYB (by Business), FY2014-FY2015
- Net Revenue Structure of KYB (by Business), FY2016H1
- Revenue Breakdown of KYB (by Business), FY2015-FY2016
- Revenue Breakdown of KYB (by Region), FY2014-FY2015
- Revenue Breakdown of KYB (by Region), FY2016H1

- Main Hydraulic Parts of KYB, 2017
- KYB's Revenue and Operating Profit from Hydraulic Components Business, FY2009-FY2016
- KYB's External Net Sales from Hydraulic Components Business by Application, FY2014-FY2015
- KYB's Development Plan for HC Business
- KYB's Net Sales from Industrial Hydraulic Components (by Product), FY2010-FY2011
- KYB's Hydraulic Business Planning, FY2014-FY2016
- KYB's Wholly-owned Subsidiaries in China, 2016
- KYB's Hydraulic Business in China
- YUKEN's Sales and Net Income, FY2010-FY2015
- YUKEN's Sales by Region, FY2012-FY2015
- YUKEN's Sales by Business, FY2012-FY2015
- YUKEN's Sales from Major Hydraulic Parts, FY2012-FY2013
- YUKEN's Subsidiaries in China
- Nabtesco's Business Realignment, 2017
- Main Operational Data of Nabtesco, 2006-2015
- Net Sales of Nabtesco by Business/Application, 2015-2016
- Sales and Operating Profit of Nabtesco by Business, 2010-2016
- Net Sales and Percentage of Nabtesco by Region, FY2008-FY2014
- Key Products and Major Customers of Aviation and Hydraulic Machinery Business of Nabtesco, 2016
- Nabtesco's Net Sales from Aviation and Hydraulic Machinery Business by Product, 2011-2016
- Market Share of Nabtesco's Excavator Hydraulic Products, 2016
- Development History of and Major Customers for Nabtesco's Hydraulic Products
- Nabtesco's Net Sales and Structure (%) in China, 2010-2016
- Equity Structure of Shanghai Nabtesco Hydraulic Co., Ltd.
- Jiangsu Hengli Hydraulic's Presence in Hydraulic Industry Chain, 2012-2017

- Jiangsu Hengli Hydraulic's Subsidiaries
- Revenue and Net Income of Hengli Hydraulic, 2008-2016
- Operating Revenue of Hengli Hydraulic by Product, 2009-2016
- Operating Revenue of Hengli Hydraulic by Region, 2009-2016
- Gross Margin of Hengli Hydraulic by Product, 2009-2016
- Hengli Hydraulic's Capacity by Product, 2008-2016
- Output, Sales, and Sales-output Ratio of Hengli Hydraulic by Product, 2008-2016
- Excavator Cylinder Sales and Market Share of Jiangsu Hengli Hydraulic, 2008-2015
- Revenue and Net Income of Yantai Eddie Precision Machinery, 2013-2016
- Operating Revenue Structure of Yantai Eddie Precision Machinery by Sales Channel, 2013-2016
- Operating Revenue Structure of Yantai Eddie Precision Machinery by Business, 2013-2016
- R&D Expenditure and % of Total Revenue of Yantai Eddie Precision Machinery, 2013-2016
- Hydraulic Breaker Capacity and Output of Yantai Eddie Precision Machinery, 2013-2016
- Hydraulic Parts Capacity and Output of Yantai Eddie Precision Machinery, 2013-2016
- Motor Capacity and Output of Yantai Eddie Precision Machinery, 2013-2016
- Output and Sales of Yantai Eddie Precision Machinery by Product, 2013-2016
- Revenue and Net Income of Shandong Taifeng Hydraulic, 2009-2016
- Operating Revenue Structure of Shandong Taifeng Hydraulic by Product, 2014-2015
- Sales and Average Unit Price of Catridge Valves of Shandong Taifeng Hydraulic, 2009-2011
- Member Companies of Yuci Hydraulics Group Corporation
- Operational Data of Taiyuan Heavy Machinery Group Yuci Hydraulic Industry, 2015-2016
- Industry Structure and Production Bases of AVIC Liyuan Hydraulic
- Revenue and Net Income of AVIC Liyuan Hydraulic, 2009-2016
- Hydraulic Products Revenue and Gross Margin of AVIC Heavy Machinery, 2013-2015
- Development History of Sunbun Hydraulic

Selected Charts

- Operating Revenue and Net Income of Beijing Huade Hydraulic Industrial Group, 2010-2016
- Hydraulic Parts Output of Beijing Huade Hydraulic Industrial Group, 2009-2016
- Revenue and Net Income of XCMG Hydraulics Co., Ltd., 2007-2016
- Milestones of SKS Hydraulic Technology, 2012-2017
- Development History of Linde Hydraulics (China)

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