



**Global and China Hydraulic Industry
Report, 2019-2025**

May 2019

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 essential to modern equipment manufacturing are largely produced in China, Germany, Italy, the United States and Japan. In 2018, the global hydraulic market was worth approximately €29.9 billion, of which China made up at least 25% and ranked second worldwide.

Hydraulic parts are mostly used in mobile machinery, industrial machinery and large-sized equipment. Especially, construction machinery consumes the overwhelming 30-40% hydraulic parts. Since 2017, China's construction machinery industry has recovered, bringing higher demand for hydraulic parts. The data shows that sales volume of construction machinery such as excavators and loaders in China without exception saw double-digit growth in 2018, and it is expected to sustain growth momentum this year, from which China's hydraulic industry will benefit greatly and hydraulic sales will outnumber RMB63 billion in 2019.

According to product classification, key components represented by cylinders, pumps and valves in China's hydraulic system hold a combined share of as high as more than 60%. The hydraulic pumps and valves are more difficult than cylinders technically, and the market is firmly occupied by Bosch-Rexroth, Eaton, Kawasaki Heavy Industries, HUSCO and Tongmyung Heavy Industries.

At present, Bosch-Rexroth, Eaton, Kawasaki Heavy Industries, Parker Hannifin and other big names control the world's most advanced hydraulic manufacturing technologies and monopolize the high-end hydraulic market. China relies on import of high-end hydraulic components (variable piston pumps, motors, and multi-way valves (development difficulty in order); except for high-pressure cylinders which can be domestically produced) from Kawasaki Heavy Industries, Bosch-Rexroth, and HUSCO. To bring localization of high-end hydraulic products into a reality, Jiangsu Hengli Hydraulic, Shandong Zhongchuan Hydraulic, AVIC Liyuan Hydraulic, Taiyuan Heavy Machinery Group Yuci Hydraulics and other companies have intensified R&D and production, and have made breakthroughs in the field of excavation.

Also, Chinese companies have become more competitive by setting up factories overseas and acquiring foreign companies, for instance, Weichai Power acquired Linde Hydraulics, Jiangsu Hengli Hydraulic took over the hydraulic piston pump business of HAWE In-Line.

Global and China Hydraulic Industry Report, 2019-2025 by ResearchInChina highlights the following:

- Global hydraulic industry scale, regional pattern (including the status quo in the United States and Germany), corporate pattern, etc.;
- Chinese hydraulic industry (policies, market size and structure, import and export, key products (hydraulic cylinders, hydraulic pumps and valves), key enterprises and aftermarket);
- Chinese construction machinery and hydraulic parts markets (status quo, key enterprises, future trends, etc.);
- 7 global and 20 Chinese key hydraulic enterprises (operation, hydraulic parts business, R&D and future strategies, etc.)



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