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China Vaccum Pump Industry Report, 2015-2018

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Abstracts

Vacuum pumps are widely used in such fields as metallurgy, chemicals, food, and electronic coating. In recent years, the rapid development of these industries has bolstered the fast growth of vacuum pumps. In 2014, the output of vacuum pumps in China reached 9.56 million units, up 7.2% from a year earlier. We predict that by 2018 this figure will be very likely to climb to 11.84 million units, with an estimated CAGR of 5.5%.

Influenced by the downstream demand and environmental requirements, vacuum pump market segments performed differently. Despite a wider application, liquid ring vacuum pumps, which are limited by requirements for environmental protection, have the shrinking market share. In contrast, dry vacuum pump market sprang up and scored great performance in recent years. But the high-end market was mainly dominated by European, American and Japanese companies.

Liquid ring pumps are used in many technological processes of industrial production, including vacuum filtration and vacuum water diversion, etc. hence a low technical requirement. In terms of price, China-made liquid ring pumps are more competitive. At present, the largest liquid ring pump manufacturers in China include Sanlian Pump Group, Shandong Hua Cheng Group, and KENFLO, etc.

Dry vacuum pumps are mainly used in a wide range of industries, including semiconductor, chemical, film, instrument, medicine, food, etc., over 50% of which are held by the foreign brands. This is particularly true of semiconductor industry, in which the overwhelming majority of vacuum pumps utilized are foreign brands. The China-made vacuum pumps are primarily applied in the chemical industry.

Still, molecular pumps are also widely used in, say, nuclear physics, electric vacuum, and surface science. As the semiconductor industry grows rapidly, the market segment

expands at a fast pace. The typical manufacturers in this segment consist of Varian(Agilent), Pfeiffer, Oerlikon Leybold, Busch, and Osaka Vacuum while he major Chinese counterparts include Beijing Beiyi Innovation Vacuum Technology, Rankuum Machinery, and CAS Shenyang Scientific Instrument. But the foreign players are well ahead of Chinese peers whether in technology or in market development.

China Vacuum Pump Industry Report, 2015-2018 mainly covers the following:

Overview of China's vacuum pump industry, including definition and classification, policies and regulations, and future development trend, etc.;

China's pump market, including output, competitive landscape, import & export, etc.

Competition situation of major market segments such as liquid ring vacuum pump, dry vacuum pump, and molecular pump;

Profile, financials, output and sale volume, major customers, main products, R&D, production base distribution, and technical characteristics of 10 foreign vacuum pump manufacturersincluding Gardner, ULVAC, Osaka Vacuum, Oerlikon Leybold, Tuthill, Atlas Copco, Busch, and Pfeiffer, and 17 Chinese counterparts such as KENFLO, Shandong Hua Cheng Group, Sanlian Pump Group, Shanghai Hanbell Precise Machinery, CAS Shenyang Scientific Instrument, Hubei Tongfang Hi-tech Pump, Shandong Bozhong Vacuum Equipment, Nantong Weishi Vacuum Equipment, Shandong Boshan Vacuum Pumps Factory, as well as Zhejiang Value Mechanical & Electrical Products.

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