

# China Valve Industry Report, 2011-2012

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## Abstracts

From January to May in 2012, China's output of valves hit 2.629 million tons, up 14.6% year-on-year. In 2012, amid the severe economic downturn in China, "steady growth" once again becomes the focus of national policy, and fixed asset investments in such sectors as steel, water conservancy and hydropower, and railway gradually resume. The valve output in China is estimated to maintain stable growth in 2012 fueled by the investment.

This report not only highlights the output, regional distribution, import & export and competition pattern of Chinese valve industry, but also analyzes the status quo and competitive landscape of market segments like metallurgy valve, nuclear power valve, air conditioning valve and petrochemical valve, and predicts the market scale of these segments. Additionally, the report studies the operation of 8 foreign valve corporations including Danfoss and KSB, etc., and 22 Chinese counterparts such as Zhejiang Sanhua Co., Ltd. and Jiangsu Shentong Valve Co., Ltd., etc.

### Metallurgy Valve

The technical reformation carried out in China's steel industry poses higher requirements on the technology process of metallurgy valves. According to the scales of newly constructed and technological transformation projects in Chinese steel industry, it is expected that the China's demand for metallurgy valves will reach RMB345 million by 2015. Jiangsu Shentong Valve Co., Ltd., Shijiazhuang No.1 Valve Company Ltd., and Shijiazhuang Sanhuan Valve Co., Ltd. are the major manufacturers in China.

### Nuclear Power Valve

Following the safety inspection of nuclear power generating units in 2011, China will restart the nuclear power project approval in 2012, when the nuclear valve market will

begin to recover. Chinese nuclear power valve market is predominantly occupied by foreign manufacturers such as KSB and VELAN, etc., and the competitive domestic players include Jiangsu Shentong Valve Co., Ltd., Dalian DV Valve Co., Ltd. and Wujiang Dongwu Machine Co., Ltd., etc.

### Air Conditioning Valve

In the air conditioning valve field, although there are signs of slackening in the growth rate of air-conditioner output in China in 2012, the market share of inverter air-conditioners rises rapidly, which will bring about robust demand for its core component--electronic expansion valve. Zhejiang Sanhua Co., Ltd. and Zhejiang Dun'an Artificial Environmental Equipment Co., Ltd. dominated approximately 70% of the global market. Sanhua saw its sales volume of electronic expansion valves get to around 7 million sets in 2011.

### Petrochemical Valve

The petrochemical industry is the largest valve consumer in China. The home-made general valves can basically meet the need of petrochemical production, but some special valves still depend on imports. The major players in this field are Neway Valve (Suzhou) Co., Ltd., Liangjing Group Valve Co., Ltd. and Lanzhou High Pressure Valve Co., Ltd., etc.

With metallurgy valve and nuclear power valve as its leading products, Jiangsu Shentong Valve boasts sharpening edges in metallurgy valve market, with market share surpassing 50%. But in recent years, the nuclear power valve contributed to a rising percentage of the company's revenue.

CNNC SUFA Technology Industry Co., Ltd. mainly produces nuclear power valve, nuclear chemistry valve and other special valves. In Q1 2012, the revenue of the company surged 50.1% YoY to RMB171 million. The company principally aims at high-end valve market and its three nuclear power valve projects initiated at the end of 2010 will be basically completed by the end of 2012, when the company's capacity will be substantially improved.

Zhejiang Sanhua Co., Ltd. specializes in manufacturing automatic control parts for household and commercial air-conditioners and is one of the Globe valve manufacturers enjoying the largest output and most complete product portfolio in the world. As of 2011, the company boasted capacity of 50 million Globe valves, over 40 million four-way

valves and 7-8 million electronic expansion valves.

The valve products of Neway Valve (Suzhou) are strongly competitive in petroleum industry and the well-known companies like GE Oil and Gas and TSI Service and Supply are the company's customers. In 2012, Neway Valve (Suzhou) makes preparation for IPO and plans to raise funds for its large-diameter valve and special valve project with annual capacity of 35,000 sets and petroleum valve project with annual capacity of 10,000 sets.

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