

Global and China Industrial Gases Industry Report, 2012-2013

<https://marketpublishers.com/r/G89B5FF3930EN.html>

Date: April 2013

Pages: 110

Price: US\$ 2,100.00 (Single User License)

ID: G89B5FF3930EN

Abstracts

The report highlights the followings:

Global Industrial Gas Market

China Industrial Gas Market

Global and China Industrial Gas Industry

12 Industrial Gas Companies

Industrial gases mainly refer to oxygen, nitrogen, argon, acetylene, carbon dioxide, hydrogen, and carbon monoxide. In 2012, the market size of industrial gases worldwide approximated USD69.8 billion, of which, it was exclusive of the gases generated by large enterprises themselves. The downstream customers of industrial gases concentrate in chemical, refining, iron & steel, welding, glass, electronics, healthcare and food industries, with the combined share of the first three surpassing 50% and keeping stable.

In 2012, the market size of global industrial gas industry increased by 4.6% year-on-year, with the growth rate down somewhat against that in 2011. The reduction mainly came as the decreased output in China iron & steel industry because of massive loss-making. Since 2013, due to the reviving real estate market, China has witnessed robust recovery in economy, especially in iron & steel and heavy chemical sectors. In the meantime, the North American region has accelerated its development of shale gas, encouraging a good many of chemical enterprises to establish new plants in America

given the consideration of low-priced natural gas. North America and China are expected to become the key engines for the development of industrial gas. And the estimation shows that the global industrial gas market scale in 2013 will surge by 6.9% year-on-year to USD74.6 billion.

In the developed Euro-Americas, there are 80% outsourcing businesses or plants, and the rest 20% are Captive. But it is not true in China, where 53% businesses or plants in 2012 were still Captive, while only 47% were outsourcing ones. It indicates that China bears a huge potential in the sector. In 2012, the industrial gas market scale in China was around USD7.98 billion, with the targeted figure in 2013 reaching USD8.63 billion. In China, iron & steel, coal chemical and refining industries are engines of the industrial gas market. And more and more iron & steel companies are expected to outsource their industrial gas business.

In June, 2011, the Chinese Government ordered to suspend coal chemical industry, forcing China to increase its dependence on the import of petroleum, natural gas and olefin. Given this, the central government called for retrieving the operation of coal chemical projects which are expected to fuel the growth of industrial gas market from Mar.2013. As of Mar. 2013, some 10 coal chemical projects had been approved out of the 104 ones in 2012 application.

In recent years, China has been frequently engulfed by haze, contributing in part to the substandard auto gas in purity. Thus, the Chinese government has to respond with hefty investment in this regard. In China, either imported or homemade crude oil is high sulfur crude oil, and H₂ Deoxo is the only solution to reduce the sulfur content. At present, large coastal refining plants are basically equipped with the capability to produce national-standard 90 and V gasoline, while their counterparts in landlocked regions fall behind. Large refining plants under Sinopec are competitive in producing national-standard 90 and V gasoline, with the capacity making up 64% of the total compared to the 23% mark of CNPC. With China's advance in producing qualified refined oil products, refineries in inland regions such as Northwest China are also pressing ahead to prepare for hydrogenation units, laying foundation for the nationwide replacement for IV gasoline. It is no doubt a huge potential for businesses specializing in hydrogen production such as APCI.

The industrial gas industry witnessed critical disparity, with the top 4 industrial players dominating 78% market share, while a proximate number of 10,000 businesses only occupying 20%. The reason attributes to the fact that the gas transportation is not easy, the demand of many small-sized industrial players is quite limited, coupled that large

businesses are reluctant to provide industrial gases for these small ones. In China, small-scaled industrial gas producers amount to as many as 3,000. In recent years, a few industrial gas companies tried their luck to find a high-speed development path, represented by Yingde Gases (listed in HK) whose revenue in 2012 soared to nearly RMB5 billion from RMB1.4 billion in 2008, with the expected figure in 2013 surpassing RMB6 billion. Another case in point was China Gas Industry Investment Holdings which was seeking for listing.

Contents

1. INTRODUCTION TO INDUSTRIAL GAS

- 1.1 Definition
- 1.2 Production

2. GLOBAL INDUSTRIAL GAS MARKET

- 2.1 Market Scale
- 2.2 Downstream Distribution
- 2.3 Global Iron & Steel Industry
- 2.4 China Industrial Gas Market
- 2.5 China Iron & Steel Industry
- 2.6 China Oil Refining Industry
- 2.7 China Coal Chemical Industry
 - 2.7.1 Engines for Industrial Development
 - 2.7.2 Scale of Industrial Investment
 - 2.7.3 Coal Chemical Projects

3. INDUSTRIAL GAS INDUSTRY

- 3.1 Ranking of Global Industrial Gas Companies
- 3.2 Overview of China Industrial Gas Industry
- 3.3 Strategies of Major Industrial Gas Companies in China
 - 3.3.1 Air Liquide
 - 3.3.2 Praxair
 - 3.3.3 Linde
 - 3.3.4 APCI
- 3.4 China Industrial Gas Industry Pattern
- 3.5 China ASU Equipment Industry

4. MAJOR INDUSTRIAL GAS COMPANIES

- 4.1 Linde Group
 - 4.1.1 Gases Division
 - 4.1.2 Engineering Division
 - 4.1.3 Healthcare Division
 - 4.1.4 Business In China

- 4.2 Air Linquide
 - 4.2.1 Gases & Service Division
 - 4.2.2 Large Operations
 - 4.2.3 Healthcare Division
 - 4.2.4 Business in China
- 4.3 Praxair
 - 4.3.1 Business in China
- 4.4 APCI
 - 4.4.1 Business in China
- 4.5 Taiyo Nippon Sanso
 - 4.5.1 Business in China
- 4.6 Airgas
- 4.7 Messer
 - 4.7.1 Business in China
- 4.8 Yingde Gases
- 4.9 Hangzhou Hangyang
- 4.10 China Gas Industry Investment Holdings
- 4.11 Qinfeng Gases
- 4.12 Chinllenge Gases

Selected Charts

SELECTED CHARTS

ASU Process Chart

Global Industrial Gas Market Size, 2009-2015E

Global Industrial Gas Market by Region, 2012

Market Share of Global Industrial Gas by Product, 2012

Industrial Oxygen Market Share by Industry, 2012

Distribution of Large-sized Oxygen Generating Plants by Region, 2013-2022E

Industrial Nitrogen Market Share by Industry, 2012

Industrial Argon Market Share by Industry, 2012

Industrial Hydrogen Market Share by Industry, 2012

Industrial Carbon Dioxide Market Share by Industry, 2012

Global Crude Steel Output, 2005-2012

Market Scale of Chinese Industrial Gas Industry, 2008-2015E

Market Share of Chinese Industrial Gas by Industry, 2008-2015E

Price Trend of Commercial Gases in China, 2010-2012

China Crude Steel Output, 2006-2013

Output of China's Major 19 Iron & Steel Companies, 2011-2012

Revenue of China's Top 30 Iron & Steel Companies, 2012

Oil Refining Amount of Sinopec, 2010-2012

Classification of Coal Chemicals

Ranking of World's Industrial Gas Businesses by Revenue, 2011-2012

Operating Margin of World's Major Industrial Gas Businesses, 2011-2012

Revenue of Air Liquide in China by Terminal Market, 2012

Revenue of Industrial Gas in China by Supply Channel, 2007/2012/2015

Market Share of Major Businesses in China Industrial Gas On-Site Supply Market, 2008/2012

Market Share of Major ASU Producers in China, 2004

Market Share of Major ASU Producers in China, 2011

Revenue and Operating Margin of Linde Group, 2007-2013

Organization of Linde Group

Revenue and Operating Margin of Linde Group from Gas Business Division, 2008-2012

Revenue of Linde Group by Region, 2008-2012

Revenue of Linde Group by Product, 2011-2012

Operating Margin of Linde Group from Engineering Business Division by Region, 2008-2012

Revenue of Linde Group by Business, 2008-2012

Revenue and Operating Margin of Linde Group from Engineering Business Division, 2008-2012

Revenue of Linde Group from Engineering Business Division by Region, 2009-2012

Order Backlog of Linde Group from Engineering Business Division by Region, 2009-2012

Revenue of Linde Group from Engineering Business Division by Business, 2009-2012

Order Backlog of Linde Group from Engineering Business Division by Business, 2009-2012

Regional Presence of Linde Group in China

Revenue and Operating Margin of Air Linquide, 2007-2013

Distribution of Employees of Air Linquide by Region, 2012

Revenue of Air Linquide by Business, 2006-2012

Revenue of Air Linquide by Terminal Market, 2012

Revenue of Air Linquide from Gases & Service Business Division by Region, 2012

Revenue of Air Linquide from European Gases & Service Business Division by Terminal Market, 2012

Revenue of Air Linquide from American Gases & Service Business Division by Terminal Market, 2012

Revenue of Air Linquide from Asia-Pacific Gases & Service Business Division by Terminal Market, 2012

Revenue of Air Linquide from Gases & Service Business Division by Terminal Market, 2012

Revenue of Air Linquide from Large-scale Business by Business, 2012

Revenue of Air Linquide from Large-scale Business by Terminal Market, 2012

Revenue of Air Linquide from Healthcare Business Division by Terminal Market, 2012

Revenue of Air Linquide from Electronic Business Division by Terminal Market, 2012

Order Backlog of Air Linquide from Engineering Construction Business Division by Business, Year-End 2012

Revenue and Operating Margin of Praxair, 2006-2013

Revenue of Praxair by Terminal Market , 2008/2010/2012

Revenue of Praxair by Region, 2008/2010/2012

Revenue of Praxair by Business, 2008/2010/2012

Business Performance of Praxair in North America, 2012

Business Performance of Praxair South America, 2012

Business Performance of Praxair in Europe, 2012

Business Performance of Praxair in Asia, 2012

Business Performance of Praxair in the Middle East and Russia, 2012

Order Backlog of Praxair by Region, Year-End 2012

Revenue and Operating Margin of APCI, 2006-2013

Revenue of APCI by Region, 2008-2012
Revenue of APCI by Business, 2008-2012
Revenue and Operating Margin of APCI from Commercial Gases, 2008-2012
Revenue and Operating Margin of APCI from Industrial Gases, 2008-2012
Revenue and Operating Margin of APCI from Electronic & High-Performance Material Business, 2008-2012
Revenue from Electronic & High-Performance Material Business of APCI by Terminal Market, 2012
Revenue of APCI by Region, 2012
Revenue of APCI by Terminal Market, 2012
Revenue of APCI by Product, 2012
Major Projects of APCI, 2013-2015E
New Projects of APCI in China
Organization of Taiyo Nippon Sanso
Revenue and Operating Margin of Taiyo Nippon Sanso, 2007-2013
Revenue of Taiyo Nippon Sanso by Business, 2011-2012
Revenue of Taiyo Nippon Sanso by Region, FY2011-FY2012
Revenue and Operating Margin of Airgas, 2007-2013
Acquisition Cases of Airgas, 1988-2012
Geographical Distribution of Airgas in America
Revenue of Airgas by Terminal Market, 2012
Revenue of Airgas by Business, 2012
Supply Chain of Airgas
Organization of Messer Group
Revenue and EBITDA of Messer, 2008-2011
Revenue of Messer by Region, 2008-2011
Workforce of Messer by Region, 2008-2011
Revenue of Messer by Product, 2011
Revenue of Messer by Business, 2011
Organization of Messer China
Revenue of Messer China by Product/Business
Business Performance of Messer China by Region
Revenue and Operating Margin of Yingde Gases, 2008-2013
Revenue of Yingde Gases by Business, 2009-2012
Commercial Gas Output of Yingde Gases, 2011-2012H1
Capacity and Equipment Distribution of Yingde Gases Nationwide, 2009-2012
Base Stations under Construction of Yingde Gases, 2012
Revenue and Operating Margin of Hangzhou Hangyang, 2008-2013
Revenue of Hangzhou Hangyang by Product, 2009-2012

Gross Margin of Hangzhou Hangyang by Product, 2009-2012
Gross Profit of Hangzhou Hangyang by Product, 2009-2012

I would like to order

Product name: Global and China Industrial Gases Industry Report, 2012-2013

Product link: <https://marketpublishers.com/r/G89B5FF3930EN.html>

Price: US\$ 2,100.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/G89B5FF3930EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970