

Global and China Hydraulic Industry Report, 2012-2015

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Abstracts

Affected by the sluggish global economy and Chinese construction machinery market, the market value of the global hydraulic industry reached USD32.7 billion in 2012, showing a year-on-year decline. China still lags behind the United States to take the world's second place.

In 2010-2011, China's hydraulic parts output witnessed the explosive year-on-year growth rate of more than 60% due to the large-scale investment. In 2012, the decreasing downstream demand led to a substantial slowdown in the growth of Chinese hydraulic components output which dropped to 250 million. 86.12% of China's hydraulic output was highly concentrated in Zhejiang, Jiangxi, Sichuan, Jiangsu and Anhui.

Currently, most Chinese hydraulic enterprises focus on the production of mid- and low-end hydraulic products with a low concentration degree, while high-end hydraulic parts are mainly imported. Therefore, key Chinese construction machinery enterprises and hydraulic manufacturers are planning R & D and production of high-end hydraulic products.

The report mainly studies market size, regional distribution, import, export and downstream industries of the global and China hydraulic industry. In addition, it analyzes the operation of seven world-renowned hydraulic manufacturers and 15 Chinese enterprises in depth.

As a major Chinese hydraulic manufacturing and R & D enterprise, Hengli Highpressure Oil Cylinder has accelerated the adjustment of the product structure and the overseas expansion in recent years. In 2013, the company's 25,000 t / a high precision hydraulic casting project went into operation; meanwhile, it plans to establish Changzhou Lixin,

and build production bases of hydraulic valves and pumps by stages. In addition to signing continuous supply agreements with Caterpillar, Japan's Kobe Steel and other clients, the company intends to set up a wholly-owned subsidiary in Japan.

Zhongchuan Hydraulic is involved in the high-end hydraulic parts market. With the total investment of RMB2.6 billion, the company plans to realize the 600,000 sets / a high-end hydraulic products project by stages, in which Phase I was put into operation in October 2011. The company's 'AP4V0112TVN hydraulic axial piston pumps, AP4V0112TE hydraulic axial piston pumps, MA170W rotary motors, VM28PF main valves' and other high-end hydraulic products were authenticated by the state in August 2012 and will be produced in large scale gradually.

Avic Liyuan Hydraulic put its new and expansion projects into operation in 2012, so that its product capacity has increased significantly. Meanwhile, the company has launched a small batch of vertebral plunger products, closed hydraulic pumps and other high-end products; the joint venture Lirui Hydraulic has completed the construction of high-pressure piston pump / motor production lines which have been put into operation now.

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