

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.

Contents

1 OVERVIEW OF HYDRAULIC INDUSTRY

1.1 Related Concept

1.1.1 Definition

1.1.2 Structure

1.2 Industry Policy

2 DEVELOPMENT OF HYDRAULIC INDUSTRY

2.1 Global

2.1.1 Market Size

2.1.2 Regional Structure

2.2 China

2.2.1 Output

2.2.2 Geographical Distribution

2.2.3 Market Size

2.3 Import and Export

2.4 Competition

2.4.1 Major Global Enterprises

2.4.2 Competition Characteristics of Chinese Market

2.5 Downstream

2.5.1 Downstream Industry

2.5.2 Investment of Main Engine Enterprises

3 MAJOR FOREIGN-FUNDED ENTERPRISES

3.1 Bosch-Rexroth

3.1.1 Profile

3.1.2 Operation

3.1.3 Revenue Structure

3.1.4 R & D

3.1.5 Development in China

3.1.6 Bosch Rexroth (Changzhou) Co., Ltd.

3.2 Eaton

3.2.1 Profile

3.2.2 Operation

3.2.3 Revenue Structure

- 3.2.4 Corporate Acquisition
- 3.2.5 Hydraulic Business
- 3.2.6 Hydraulic Business in China
- 3.3 Parker Hannifin
 - 3.3.1 Profile
 - 3.3.2 Operation
 - 3.3.3 Revenue Structure
 - 3.3.4 Subsidiaries in China
- 3.4 Kawasaki Precision Machinery Ltd./KPM
 - 3.4.1 Profile
 - 3.4.2 Operation
 - 3.4.3 Kawasaki Precision Machinery (Suzhou) Ltd.
- 3.5 KYB
 - 3.5.1 Profile
 - 3.5.2 Operation
 - 3.5.3 Revenue Structure
 - 3.5.4 R & D
 - 3.5.5 Hydraulic Components Business
 - 3.5.6 Business in China
 - 3.5.7 KYB Industrial Machinery (Zhenjiang) Ltd.
- 3.6 YUKEN
 - 3.6.1 Profile
 - 3.6.2 Operation
 - 3.6.3 Development in China
- 3.7 Nabtesco
 - 3.7.1 Profile
 - 3.7.2 Operation
 - 3.7.3 Revenue Structure
 - 3.7.4 Aviation and Hydraulic Machinery Business
 - 3.7.5 Business in China
 - 3.7.6 Shanghai Nabtesco Hydraulic Co., Ltd.
 - 3.7.7 Jiangsu Nabtesco Hydraulic Co., Ltd.

4 MAJOR CHINESE HYDRAULIC ENTERPRISES

- 4.1 Hengli Highpressure Oil Cylinder (601100)
 - 4.1.1 Profile
 - 4.1.2 Operation
 - 4.1.3 Revenue Structure

- 4.1.4 Gross Margin
- 4.1.5 Output and Sales Volume
- 4.1.6 R & D and Investment
- 4.1.7 Clients
- 4.1.8 Development Prospect
- 4.2 Shandong Taifeng Hydraulic Co., Ltd.
 - 4.2.1 Profile
 - 4.2.2 Operation
 - 4.2.3 Revenue Structure
 - 4.2.4 Gross Margin
 - 4.2.5 Fund-raising and Investment Projects
- 4.3 Yuci Hydraulics Group Corporation
 - 4.3.1 Yuci Hydraulics Company Limited
 - 4.3.2 Changzhi Hydraulics Company Limited
- 4.4 Taiyuan Heavy Machinery Group Yuci Hydraulics Company Limited
- 4.5 Avic Liyuan Hydraulic Co., Ltd.
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Investment
- 4.6 Sunbun Hydraulic
- 4.7 Zhejiang Stronger Hydraulic Co., Ltd.
 - 4.7.1 Profile
 - 4.7.2 Subsidiaries
- 4.8 Shandong Zhongchuan Hydraulic Co., Ltd.
- 4.9 Beijing Huade Hydraulic Industrial Group Co., Ltd.
 - 4.9.1 Profile
 - 4.9.2 Operation
- 4.10 Haimen Hydraulic Component Plant Co., Ltd.
- 4.11 Sichuan Changjiang Hydraulic Parts Co., Ltd.
- 4.12 Xuzhou Hydraulic Component Factory Co., Ltd.
 - 4.12.1 Profile
 - 4.12.2 Operation
- 4.13 Ningbo Wide Sky SKS Hydraulic Co., Ltd.
- 4.14 Shandong Longyuan Hydraulic Technology Co., Ltd.
- 4.15 Jiangsu Guorui Hydraulic Pressure Machine Co., Ltd.

Selected Charts

SELECTED CHARTS

Structure of Hydraulic System

Relevant Policies in China Hydraulic Industry

Market Scale of Global Hydraulic Industry, 2000-2013E

Sales Structure of Global Hydraulic Industry (by Country / Region), 2011

Output and YoY Growth Rate of Hydraulic Components in China, 2006-2013

Output Structure of Hydraulic Components in China by Region, 2012

Output Value of China Hydraulic Industry, 2006-2015E

Sales Structure of Hydraulic System Products in China

Import and Export Value of Hydraulic Components in China, 2005-2012

Key Hydraulic Enterprises and Their Sales in the World, 2012

Application Structure of Hydraulic Components in China

Sales of China Engineering Machinery Industry, 2005-2015E

Investment of Chinese Engineering Machinery Main Engine Enterprises in Hydraulic Industry, 2008-2012

Revenue and YoY Growth Rate of Bosch-Rexroth, 2004-2012

Revenue Breakdown and Percentage of Bosch-Rexroth (by Region), 2011-2012

R&D Costs and % of Total Revenue of Bosch-Rexroth, 2004-2012

Net Revenue and Net Income of Eaton, 2007-2013

Revenue Breakdown and Percentage of Eaton (by Business), 2010-2012

Revenue Breakdown and Percentage of Eaton (by Region), 2009-2012

Enterprises Acquired by Eaton, 2012

Revenue and Operating Profit of Eaton's Hydraulic Business, 2009-2013

Plant Distribution of Parker Hannifin (by Region / Business)

Net Revenue and Net Income of Parker Hannifin, FY2007-FY2013

Revenue Breakdown and Percentage of Parker Hannifin (by Business),
FY2010-FY2013

Revenue of Parker Hannifin (by Region), FY2010-FY2012

Global Production Bases of Kawasaki Precision Machinery

Revenue and Operating Profit of Kawasaki Precision Machinery, FY2010-FY2012

Net Revenue and Net Income of KYB, FY2004-FY2013

Revenue (by Business) of KYB, FY2010-FY2012

Net Revenue and Percentage of KYB (by Region), FY2010-FY2011

R&D Costs and % of Total Revenue of KYB, FY2006-FY2012

Main Hydraulic Component Products of KYB, 2013

Revenue and Operating Profit of KYB's Hydraulic Components Business,

FY2009-FY2012

External Net Sales Percentage of KYB's Hydraulic Components Business (by Purpose), FY2012

Net Revenue and Percentage of KYB's Industrial Hydraulic Components (by Product), FY2010-FY2011

New Hydraulic Subsidiaries of KYB, 2013

New and Ongoing Hydraulic Components Projects of KYB, FY2012-FY2013

Wholly-owned Subsidiaries of KYB in China, 2013

Net Revenue and Operating Profit of KYB Industrial Machinery (Zhenjiang), FY2010-FY2012

Cylinder Output of KYB Industrial Machinery (Zhenjiang), FY2011-FY2013

Revenue and Net Income of Japan Yuken, FY2010-FY2013Q1

Subsidiaries of Japan Yuken in China

Revenue and Net Income of Nabtesco, FY2008-FY2013

Revenue and Operating Profit of Nabtesco (by Product), FY2008-FY2013

Net Revenue and Percentage of Nabtesco (by Region), FY2008-FY2013Q1

Main Products and Major Clients of Nabtesco's Aviation and Hydraulic Machinery Business, 2013

Revenue Percentage of Nabtesco's Aviation and Hydraulic Machinery Business (by Product), FY2011-FY2012

Nabtesco's Market Share in Excavator Hydraulic Products, 2011

Net Revenue and Percentage of Nabtesco in China, FY2010-FY2012

Shareholding Structure of Shanghai Nabtesco Hydraulic

Revenue and Net Income of Hengli Highpressure Oil Cylinder, 2008-2013

Revenue of Hengli Highpressure Oil Cylinder (by Product), 2008-2012

Revenue of Hengli Highpressure Oil Cylinder (by Region), 2008-2012

Gross Margin of Hengli Highpressure Oil Cylinder (by Product), 2008-2012

Capacity of Hengli Highpressure Oil Cylinder (by Product), 2008-2013E

Output and Sales Volume of Hengli Highpressure Oil Cylinder (by Product), 2008-2012

R&D Costs and % of Total Revenue of Hengli Highpressure Oil Cylinder, 2008-2012

Name list and Revenue Contribution of Top 5 Clients of Hengli Highpressure Oil Cylinder, 2011-2012

Revenue and Net Income of Hengli Highpressure Oil Cylinder, 2011-2015E

Revenue and Net Income of Shandong Taifeng Hydraulic, 2009-2011

Revenue of Shandong Taifeng Hydraulic (by Product), 2009-2011

Cartridge Valve Sales Volume and Average Unit Price of Shandong Taifeng Hydraulic, 2009-2011

Gross Margin of Shandong Taifeng Hydraulic (by Product), 2009-2011

Member Companies of Yuci Hydraulics Group Corporation

Industrial Structure and Production Bases of Avic Liyuan Hydraulic
Sales and Net Income of Avic Liyuan Hydraulic, 2009-2012
Development Course of Sunbun Hydraulic
Operating Revenue and Net Income of Beijing Huade Hydraulic, 2010-2012
Hydraulic Components Output of Beijing Huade Hydraulic, 2009-2012
Revenue and Net Income of Xuzhou Hydraulic Component Factory, 2007-2012

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