

Research Report on China Valve Industry, 2017-2021

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Abstracts

Description

A valve is a device that regulates, directs or controls the flow of a fluid by opening, closing, or partially obstructing various passageways.

A Valve is a key device in fluid controlling system, which is generally applied in liquid or gaseous fluid controlling environment. The major application fields include petroleum, natural gas, electric power, chemical industry, water supply and sewage treatment, papermaking, metallurgy, pharmacy and food producing. The development of valve industry is closely related to macro- economy because valves are widely applied to various industrial fields concerning fluid controlling.

According to CRI, the competition among global valve manufacturing enterprises is fierce. Mergers and reorganizations between enterprises emerge frequently, causing the market concentration rate rising. On April, 2017, Emerson finished buying the valve and controlling business under Pentair for USD 3.15 billion.

As the competition in global valve market becomes increasingly fierce, many world-famous valve manufacturers close their plants in North America, Europe and Japan and move to China, India, Korea, etc. in order to reduce cost.

Since China's reform and opening- up, valve industry in China develops rapidly,. China has become the largest valve manufacturer in the globe. Currently, about 50% of global valve parts are purchased from China. More finished valve products are purchased from China considering factors like OEM. China has become the world's largest exporter of valves, but China still needs to import a huge amount of middle to high- end valves annually.

According to CRI, there are over 3,000 valve manufacturing enterprises in China currently, ranking the world's first. Zhejiang is the largest and leading pump valve manufacturing base and sales center in China. The valve enterprises in Zhejiang are located in Wenzhou, Taizhou, Ningbo, Jinhua, etc. Most of these enterprises are of small scale, among which there are no more than 500 enterprises with annual sales revenue exceeding CNY 20 million, and only a dozen enterprises with annual sales revenue exceeding CNY 100 million. The concentration rate of valve enterprises in China is quite low. The sum of market share of the top ten enterprises is less than 10%.

According to CRI, the output volume of valves exceeded 10 million tons in China in 2016. The output volume of valves is on an overall growing trend in China in recent years. The major driving forces of downstream include central air- conditioning, energy power, metallurgy fields, etc.

The market scale of central air- conditioning exceeded CNY 80 billion in China in 2016.

At present, apart from the nine basic types of central air- conditioning, the special central air- conditioning business is developing rapidly in China. The Chinese government expands financial input in nuclear power. The goal of expected installed capacity in 2020 is set from 40 million kW to 75 million kW. One one- million- kW nuclear power project needs refrigeration equipment valued for about CNY 0.15- 0.20 billion.

It is estimated that the value of the total demand for refrigeration equipment is about more than CNY 10 billion in the next ten years. Meanwhile, the fixed asset investment led by the Chinese government is increasing annually. The huge projects, including 'West- East Natural Gas Transport', 'West- East Electricity Transmission', and 'South- North Water Transfer Project' need a huge amount of valve products to support. In addition, as China is faced with the approaching of industrialized age, there is an increasing demand for valve products in petrochemical industry, electric power sector, metallurgy sector, chemical industry and urban construction.

According to CRI, the drop of international oil price resulted in the decline of capital expenditure of crude oil tycoon, influencing the global demand for valves. It is estimated that the gradual economic recovery in the U.S. and the world will bring up the fixed asset investment and thus supporting the energy industry in the next few years.

As the urbanization and industrialization accelerates, and the infrastructure construction keeps promoting in China, it is estimated that fixed asset investment will remain the

important power driving China's economic development for a rather long period in future. The development in electric power, chemical industry, metallurgy, papermaking, water processing industry will promote China's demand for valve products. In addition, Made in China 2025 formulated by the Chinese government will promote China's valve industry to some extent.

Readers can obtain the following information or more through this report:

Development Environment of China Valve Industry

Supply and Demand of China Valve Industry

Analysis on Key Valve Manufacturing Enterprises in China Market

Competition of China Valve Market

Import and Export of Valves in China

Driving Forces and Market Opportunities in China Valve Industry

Threats and Challenges Faced by China Valve Industry

Forecast on China Valve Industry

Contents

1 BASIC CONCEPT OF VALVES

1.1 Definition and Classification of Valves

1.1.1 Definition

1.1.2 Classification and Usage

1.1.3 Industry Chain of Valve Manufacture

1.2 Development Environment of Valve Industry in China, 2011-2016

1.2.2 Policy Environment

1.2.2 Economic Environment

1.3 Parameters and Assumptions

1.3.1 Research Methods

1.3.2 Data Sources

1.4 About CRI

2 SUPPLY AND DEMAND OF CHINA VALVE INDUSTRY, 2011-2016

2.1 Production Status

2.1.1 Production Capacity

2.1.2 Output Volume

2.2 Niche Production Capacity and Output Volume

3. DEMAND OF CHINA VALVE MARKET, 2011-2016

3.1 Demand

3.1.1 Overall Demand

3.1.2 Application Fields

3.2 Factors Influencing Demand for Valve Products in China

3.2.1 Economic Situation

3.2.2 Government Investment

3.2.3 Technology

3.3 Niche Demand Fields of Valves in China, 2011-2016

3.3.1 Valves for Petrochemical Equipment

3.3.2 Valves for Urban Buildings

3.3.3 Valves for Urban Heat Supply

3.3.4 Valves for Environment Protection

3.3.5 Valves for Urban Gas Supply

3.3.6 Valves for Long-distance Pipelines

- 3.3.7 Valves for Power Stations
- 3.3.8 Valves for Metallurgy
- 3.3.9 Valves for Offshore Platform
- 3.3.10 Valves for Food and Pharmaceuticals
- 3.3.11 Valves for Air-conditioners

4 ANALYSIS ON MARKET COMPETITION IN CHINA VALVE INDUSTRY, 2011-2016

- 4.1 Overview on Market Competition in China Valve Industry
 - 4.1.1 Barriers to Entry and Exit
 - 4.1.2 Industry Concentration Rate
- 4.2 Major Players in the Competition
 - 4.2.1 Domestic Enterprises
 - 4.2.2 Foreign-funded Enterprises
- 4.3 Competition Structure of Valve Enterprises in China
 - 4.3.1 Bargaining Ability of Upstream Suppliers
 - 4.3.2 Bargaining Ability of Downstream Customers
 - 4.3.3 Internal Competition
 - 4.3.4 Potential Entrants
 - 4.3.5 Substitutes

5 IMPORT AND EXPORT OF VALVES IN CHINA, 2011-2016

- 5.1 Analysis on Import of Valves in China
 - 5.1.1 Import Overview
 - 5.1.2 Major Sources of Import
- 5.2 Analysis on Export of Valves in China
 - 5.2.1 Export Overview
 - 5.2.2 Major Export Destinations

6 MAJOR VALVE MANUFACTURING ENTERPRISES IN CHINA MARKET, 2015-2017

- 6.1 Suzhou Neway Valve Co., Ltd.
 - 6.1.1 Enterprise Profile
 - 6.1.2 Operation Status
- 6.2 CNNC SUFA Technology Industry Co., Ltd.
- 6.3 Liangjing Valve Group Co., Ltd.
- 6.4 Huanqiu Valve Group Co., Ltd.

- 6.5 Guangdong Mingzhu Group Co., Ltd.
- 6.6 Hubei Hongcheng General Machinery Co., Ltd.
- 6.7 Jiangsu Shentong Valve Co, Ltd.
- 6.8 Zhejiang CHAODA Valve Co., Ltd.
- 6.9 Shanghai Lianggong Valve Factory Co., Ltd.
- 6.10 Jiangnan Valve Co., Ltd.
- 6.11 Lanzhou High Pressure Valve Co., Ltd.
- 6.12 Ningbo Amico Copper Valve Co., Ltd.
- 6.13 Shanghai Shenfei Valve Manufacture Co., Ltd.
- 6.14 Wuzhou Valve Co., Ltd.
- 6.15 Zigong High Pressure Valve Co., Ltd.
- 6.16 Zhuzhou Southern Valve Co., Ltd.
- 6.17 Tyco Valve (China) Co., Ltd.
- 6.18 Danfoss (China)
- 6.19 KSB (China) Group
- 6.20 Emerson (China) Electric Co.
- 6.21 Watts Water Technologies, Inc.
- 6.22 Spirax Sarcocn (China) Co., Ltd.
- 6.23 Azbil Group
- 6.24 PENTAIR
- 6.25 Caleffi SPA
- 6.26 Koso Automatic-Control Engineering (Wuxi) Co., Ltd.

7 PROSPECT OF CHINA VALVE INDUSTRY, 2017-2021

7.1 Factors Influencing Development

7.1.1 Market Opportunities and Driving Forces in China Valve Industry

7.1.2 Threats and Challenges in China Valve Industry

7.2 Forecast on Supply of Valve in China, 2017-2021

7.2.1 Forecast on Production Capacity and Output Volume of China Valve Industry, 2017-2021

7.2.2 Forecast on Product Category

7.3 Forecast on Demand of China Valve Industry, 2017-2021

7.3.1 Forecast on Demand Fields

7.3.2 Forecast on Market Scale

7.3 Analysis on Cost of Production in China Valve Industry

7.3.1 Labor Costs

7.3.2 Costs of Raw Materials

7.4 Development Trend of China Niche Valve Industry

Selected Charts

SELECTED CHARTS

Chart Output Volume of Valves in China, 2006-2016

Chart Market Scale of Valve Industry in China, 2011-2016

Chart Export of China Valve Industry, 2011-2016

Chart Operation of CNNC SUFA Technology Industry Co., Ltd., 2012-2016

Chart Operation of Zhuzhou Southern Valve Co., Ltd., 2012-2016

Chart Manufacturing Bases of Tyco in China

Chart Export Status of Partial Varieties of Valves in China, 2016

Chart Major Export Destinations of HS 84812020 (Pneumatic Transmission Valve) for China, 2016

Chart Forecast on Output Volume of Valves in China, 2017-2021

Chart Forecast on Market Scale of Valves in China, 2017-2021

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