

The China Hydraulic Components Market

Product Briefing

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Hydraulic Components in China

This LPS provides an in-depth understanding of the market for hydraulic components in Mainland China, which was produced from our primary survey in 2H, 2011.



This study focuses on domestic sales of hydraulic components which are divided into four product categories: hydraulic pumps, hydraulic cylinders, hydraulic valves and hydraulic motors. A quantitative and qualitative assessment of the following is included:

- Market Figures
- Competitive Analysis
- Channel Analysis
- Analysis by industry
- Growth Rates & Forecasts
- Market Opportunities

Interviewed Companies include:

Bosch, Eaton Hydraulic, Parker Hanifin, Parker Tejing, Xuzhou Xugong, Shanghai Nabtesco, Beijing Huade, Hydac, Zhonghang Liyuan, Sichuan Changjiang, Linhai Haidong, Hefei Changyuan, Jinan Hydraulic, High-Tech Fluid Power, Hymen Youwei, Wide Sky SKS.

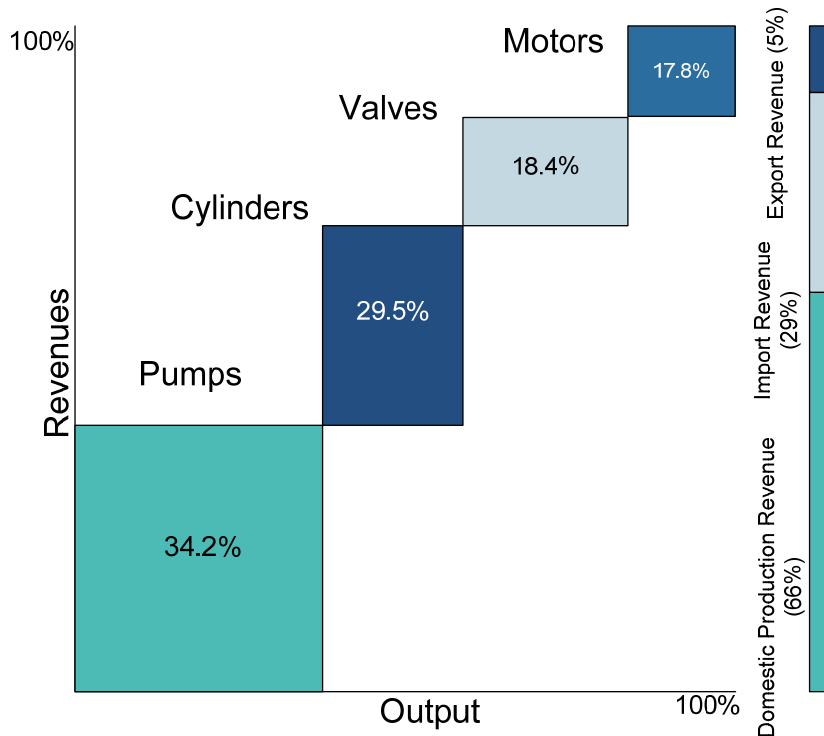
The following figure shows a breakdown of the interviews conducted for this study.

Interview Sampling

Target Groups	Companies (No.)
Suppliers	50
Downstream Players	39
Experts	1
Total	90

The market grew by approximately 11.2% in 2011 and will maintain a CAGR of around 13% through to 2015.

Market Size Figures 2011



Source: GCiS

Definitions

Hydraulic Pumps are used in hydraulic drive systems and can be hydrostatic or hydrodynamic in nature. Hydrostatic pumps are positive displacement pumps, while hydrodynamic pumps can have either a fixed or variable displacement volume.

Hydraulic Cylinders are mechanical actuators used to give a unidirectional force through a unidirectional stroke. They have many applications, most notably in engineering vehicles such as excavators, backhoes and mechanical diggers.

Hydraulic Valves are usually designed to be very strong and heavy duty in order to cope with high pressures and stresses. Certain types of hydraulic valves can control the direction of the flow of hydraulic fluid and act as a control unit for a system. Many different types of hydraulic valve exist, and are classified both in terms of function (e.g. pressure control, flow control etc) and methods of activation (e.g. radio controlled, pilot operated, electronically activated etc).

Hydraulic Motors are mechanical actuators that convert hydraulic pressure and flow into torque and angular displacement (rotation). A hydraulic motor could be described as the rotary counterpart of a hydraulic cylinder. Hydraulic motors are often designed for the working pressure at both sides of the motor.

Target Market: The target market of this study is defined as the market in China for these four types of hydraulic components among the main end-user industries: construction/engineering machinery, agricultural machinery, mining & metallurgy, petrochemicals, ports & shipping, automotive and plastic production machinery. This study does not consider other types of hydraulic component, fluids, systems or pipes.

Most major international suppliers are already in the market. They control just over 50% of revenues, chiefly in the high price points. Their domestic rivals are looking to improve technological capabilities but remain primarily pricing focused.

Market Entry

Market entry for domestic companies is complicated by high investment requirements, dominance of foreign players due to technological advantages and the high volume production requirements needed to make operations profitable.

Trends

Key trends are the rise in domestic demand for quality components, which results in a growing demand for both imports and for domestic suppliers to increase the quality of their products.

Competitive Environment

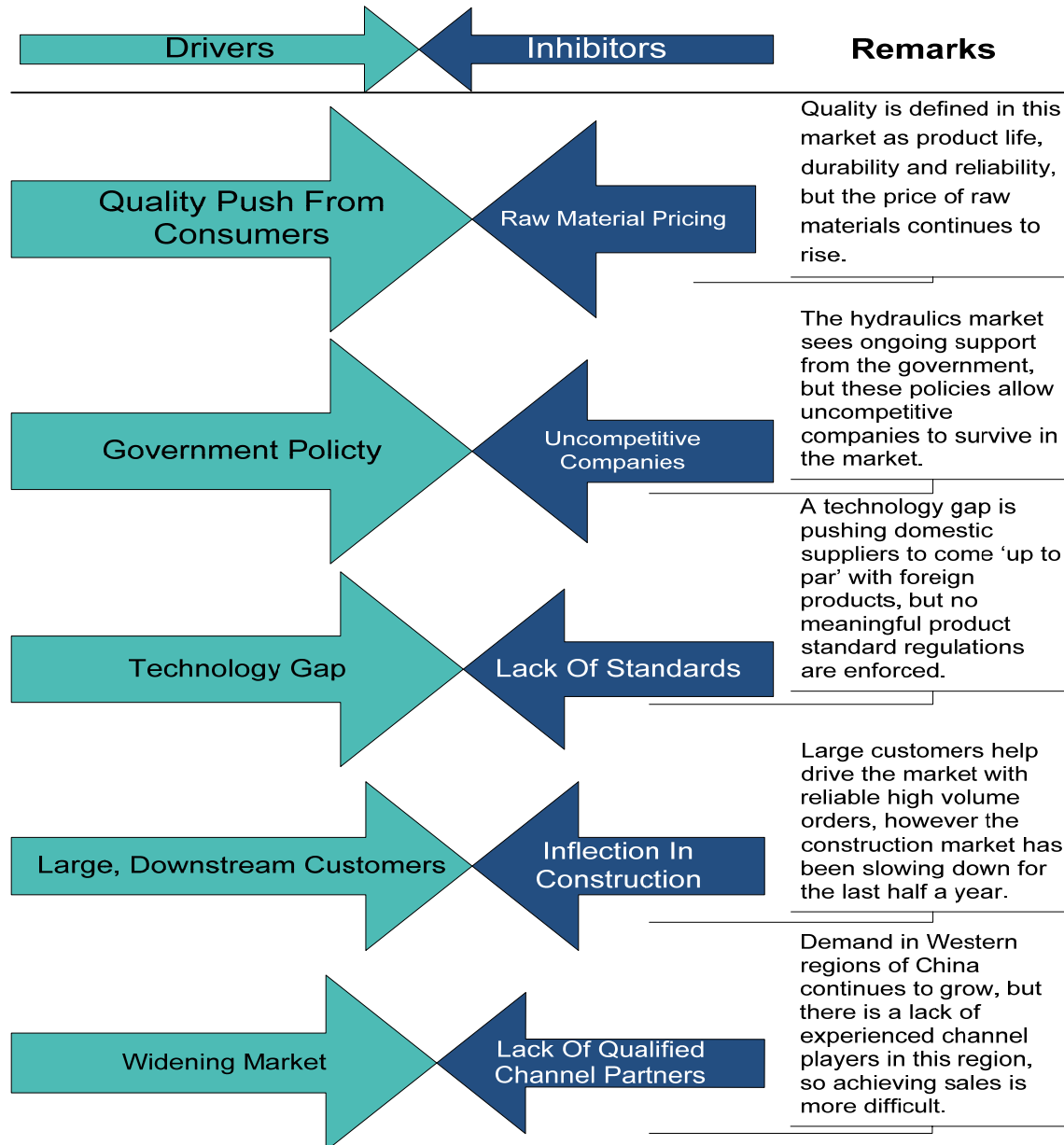
Regional Focus

Demand for hydraulic components is highest in the East, followed by the South and Central regions of China. Please see GCiS classification of provinces by region for more information.

Foreign and Domestic Firms

Foreign suppliers control more than 50% of the market and enjoy further advantages from a technological oligopoly. Domestic suppliers are still very much trying to play catch up in terms of meeting quality standards set by foreign products.

Drivers & Inhibitors “Domestic demand drives future growth”



Purchasing the Study

This Study is priced at:

Complete Study: **RMB 23,600**

Aggregate Analysis: **RMB 16,100**

Competitive Analysis: **RMB 11,100**

Product Segments Analysis (each): **RMB 8,700**

Executive Summary: **RMB 10,400**

Supplier Profiles: **RMB 13,800**

Influencer Analysis: **RMB 9,800**

Plus Tax

Major areas covered include:

- Market size and shares
- Five-year Projections
- Market Structure
- Pricing trends
- Distribution
- Consumption
- Assessment of key suppliers

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