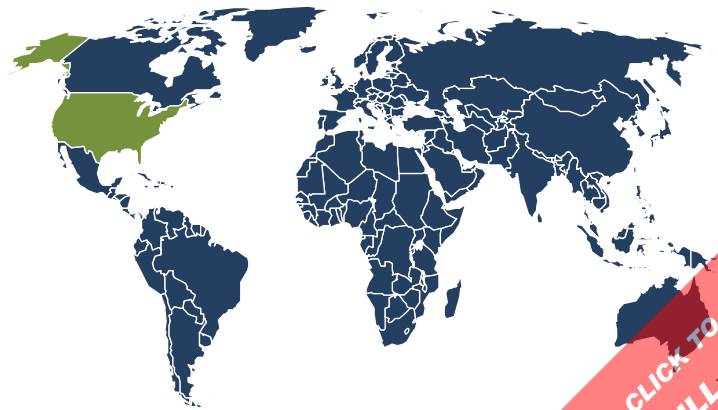




Freedonia Focus Reports  
US Collection

# Industrial Valves: United States

January 2016



## Highlights

### Market Environment

Historical Trends | Key Economic Indicators | Technological Trends  
Legal and Regulatory Factors | NAFTA Overview | Shipments Overview

### Segmentation and Forecasts

Products | Markets

### Industry Structure

Industry Composition and Characteristics | Additional Companies Cited

### Resources

[www.freedoniafocus.com](http://www.freedoniafocus.com)

CLICK TO ORDER  
FULL REPORT  
**BROCHURE**  
CLICK TO ORDER  
FULL REPORT

## ABOUT THIS REPORT

### Scope & Method

This report forecasts US industrial valve demand and shipments in US dollars at the manufacturers' level to 2019. Total demand is segmented by product in terms of:

- standard multiturn
- standard quarterturn
- other standard valves such as waterworks, gas cylinder, and nuclear types
- automatic control
- automatic regulator
- automatic actuators.

Excluded from the scope of this report are valves used in hydraulic and pneumatic fluid power systems, valves utilized primarily in automotive applications, and other original-equipment-type valves used as components in internal combustion engines and other non-industrial applications.

Total demand is also segmented by market as follows:

- process manufacturing
- oil and gas
- water infrastructure
- other markets such as construction, electric power generation and distribution, and healthcare.

To illustrate historical trends, total demand and total shipments are reported at five-year intervals for 2004, 2009, and 2014; the various demand segments are reported for 2009 and 2014.

This report quantifies trends in various measures of growth. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided at five-year intervals with CAGRs for the years corresponding to other reported figures. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report

items by page is available in the [Table of Contents](#).

## Sources

*Industrial Valves: United States* (FF70024) is based on [World Industrial Valves](#), a comprehensive industry study published by The Freedonia Group in January 2016. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other industry studies by The Freedonia Group.

Specific sources and additional resources are listed in the [Resources](#) section of this publication for reference and to facilitate further research.

## Industry Codes

The topic of this report is related to the following industry codes:

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
332911	Industrial Valve Mfg	3491	Industrial Valves
332912	Fluid Power Valve and Hose Fitting Mfg	3492	Fluid Power Valves and Hose Fittings
		3494	Valves and Pipe Fittings, NEC
332919	Other Metal Valve and Pipe Fitting Mfg	3593	Fluid Power Cylinders and Actuators
333995	Fluid Power Cylinder and Actuator Mfg		

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by MarketResearch.com, Inc.

## Table of Contents

Section	Page
About This Report .....	i
Highlights.....	1
Market Environment .....	2
Historical Trends .....	2
Chart 1   US Industrial Valve Demand Trends; 2004, 2009, 2014 (US\$ mil) .....	2
Key Economic Indicators .....	3
Table 1   Key Indicators for US Industrial Valve Demand; 2009, 2014, 2019 (US\$ bil) .....	3
Technological Trends.....	4
Legal & Regulatory Factors .....	5
NAFTA Overview .....	7
Chart 2   NAFTA Industrial Valve Demand by Country, 2014 .....	7
Shipments Overview .....	8
Chart 3   US Industrial Valve Shipments; 2004, 2009, 2014, 2019 (US\$ mil) .....	8
Segmentation & Forecasts.....	9
Products .....	9
Chart 4   US Industrial Valve Demand by Product; 2009, 2014, 2019 (US\$ mil) .....	9
Standard Multiturn. ....	10
Standard Quarterturn.....	11
Other Standard Valves. ....	12
Automatic Control. ....	14
Automatic Regulator. ....	15
Automatic Actuators.....	16
Chart 5   US Industrial Valve Demand by Product Share; 2009, 2014, 2019 (%).....	17
Markets .....	18
Chart 6   US Industrial Valve Demand by Market; 2009, 2014, 2019 (US\$ mil) .....	18
Process Manufacturing .....	18
Oil & Gas. ....	19
Water Infrastructure. ....	21
Other Markets. ....	22
Chart 7   US Industrial Valve Demand by Market Share; 2009, 2014, 2019 (%) .....	23
Industry Structure .....	24
Industry Composition & Characteristics .....	24
Company Profile 1   Cameron International Corporation .....	25
Company Profile 2   Emerson Electric Co .....	26
Company Profile 3   General Electric Company .....	27
Additional Companies Cited.....	28
Resources .....	29

To return here, click on any Freedonia logo or the Table of Contents link in report footers.  
 PDF bookmarks are also available for navigation.

## RESOURCES

### The Freedonia Group

3369 <i>World Industrial Valves</i> , January 2016	<a href="http://www.freedoniagroup.com">www.freedoniagroup.com</a>
Related Industry Studies	
3345 <i>World Gaskets &amp; Seals</i> , December 2015	<a href="#">see study contents</a>
3272 <i>World Plastic Pipe</i> , July 2015	<a href="#">see study contents</a>
3288 <i>Water Treatment Equipment</i> , May 2015	<a href="#">see study contents</a>
3231 <i>World Pumps</i> , January 2015	<a href="#">see study contents</a>
3197 <i>World Upstream Oil &amp; Gas Outlook</i> , December 2014	<a href="#">see study contents</a>
3226 <i>Gaskets &amp; Seals</i> , October 2014	<a href="#">see study contents</a>
Related Focus Reports	
<i>Filters: United States</i>	<a href="#">see report contents</a>
<i>Manufacturing: United States</i>	<a href="#">see report contents</a>
<i>Plastic Pipe: United States</i>	<a href="#">see report contents</a>
<i>Plumbing Fixtures &amp; Fittings: United States</i>	<a href="#">see report contents</a>
<i>Water &amp; Wastewater Pipe: United States</i>	<a href="#">see report contents</a>
<i>World Industrial Valves</i>	<a href="#">see report contents</a>
Freedonia Custom Research	<a href="#">see capabilities</a>

### Trade Publications

<i>Chemical &amp; Engineering News</i>	<a href="http://cen.acs.org">http://cen.acs.org</a>
<i>Flow Control</i>	<a href="http://www.flowcontrolnetwork.com">www.flowcontrolnetwork.com</a>
<i>Hydrocarbon Processing</i>	<a href="http://www.hydrocarbonprocessing.com">www.hydrocarbonprocessing.com</a>
<i>Oil &amp; Gas Journal</i>	<a href="http://www.ogj.com">www.ogj.com</a>
<i>Processing</i>	<a href="http://www.processingmagazine.com">www.processingmagazine.com</a>
<i>Valve Magazine</i>	<a href="http://www.valvemagazine.com">www.valvemagazine.com</a>
<i>Valve World</i>	<a href="http://www.valve-world.net">www.valve-world.net</a>

### Agencies & Associations

American Petroleum Institute	<a href="http://www.api.org">www.api.org</a>
American Water Works Association	<a href="http://www.awwa.org">www.awwa.org</a>
International Organization for Standardization	<a href="http://www.iso.org">www.iso.org</a>
Underwriters Laboratories	<a href="http://ul.com">http://ul.com</a>
United States Census Bureau	<a href="http://www.census.gov">www.census.gov</a>
United States Environmental Protection Agency	<a href="http://www.epa.gov">www.epa.gov</a>
United States International Trade Commission	<a href="http://www.usitc.gov">www.usitc.gov</a>
Valve Manufacturers Association of America	<a href="http://www.vma.org">www.vma.org</a>

**Environmental Impact.** Please consider the environment before printing this report. Freedonia Focus Report collections feature environmentally friendly products distributed entirely via electronic channels.