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World Industrial Valves

Industry Study with Forecasts for **2011 & 2016**

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Toll Free US Tel: 800.927.5900 or +1 440.684.9600

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China is rapidly becoming a key player in the global valve industry, with valve production of $5.6 billion in 2006, making it the fourth largest valve manufacturer in the world.

Global demand to grow 4.4% yearly through 2011

Global demand for industrial valves is forecast to increase 4.4 percent annually through 2011 to $77.6 billion. Gains will be driven by a healthy outlook for the global economy, leading to increased fixed investment activity in key valve markets such as the US, China and Germany. Valve demand in the energy production sector will also benefit from a pickup in primary energy consumption in mature markets like North America, as well as in developing valve markets such as Latin America.

World Industrial Valve Demand
($77.6 billion, 2011)

Developing Asian markets to see fastest gains

The largest and most advanced industrial valve industries are located in developed nations, particularly those which have large domestic markets, technical expertise in making higher-value products, and access to capital, labor and other production factors. This is made apparent by the fact that the US, Germany, Italy and Japan together accounted for about half of global valve shipments in 2006 in dollar terms. China, however, is rapidly becoming a key player in the valve industry, with valve production of $5.6 billion in 2006, making it the fourth largest manufacturer. France, the United Kingdom, Russia and Taiwan are also sizable valve producers, each with at least $1.6 billion in annual shipments. The largest net exporters of valves are Germany, Italy and Japan.

The advanced nations of North America, Western Europe and the Asia/Pacific region (i.e., Australia, Japan, New Zealand and Singapore) comprise mature markets for valves. Growth in valve demand in the US, Japan and Western Europe will trail the world average through 2011. Growth will be much stronger in rapidly developing nations such as China, Indonesia, Thailand, Malaysia and India. Advances in valve demand in these areas will be driven by healthy economic and fixed investment growth, while an expanding market for more expensive automated valves and actuators will support overall valve gains in the US, Japan and Western Europe.

Automatic valves to outpace conventional types

The global market for automatic valves will outpace that for conventional valves, due to the ongoing efforts of process manufacturers to improve operational efficiencies. The strongest gains will be registered in sales of separately sold automatic actuators, which are used together with standard valves to allow for automated valve functions, and are less expensive than automatic control and regulator valves with actuators pre-installed. Nevertheless, conventional valves will continue to account for 54 percent of total valve demand in 2011, due to their low cost relative to other highly-engineered automatic valves.

World Industrial Valves

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Sample Text, Table & Chart

TABLE V-6

FRANCE - INDUSTRIAL VALVE SUPPLY & DEMAND
(million dollars)

Item	1996	2001	2006	2011	2016
Gross Fixed Investment (bil 2005$)					420.5
$ valves/000$ fixed investment					
Industrial Valve Demand					
Conventional:					
Standard Multiturn					
Quarterturn					
Other					
Automatic:					
Automatic Control Valves					
Automatic Regulator Valves					
Automatic Actuators					
net exports					
conventional					
automatic					
Industrial Valve Shipments					
Conventional					
Automatic					
% France					
WE Industrial Valve Shipments	16243	19689	23300	29150	33100

SAMPLE TABLE

WESTERN EUROPE

France's industrial valve shipments in 2006 totaled $2.7 trailing only Germany and Italy in the region, although Franc surplus is much smaller, being equivalent to less than one pe domestic output in 2006. This is mainly due to the fact that d outpaced production over the 1996-2006 period, leading to a reduction of the country's trade surplus. Major destinations include the EU area, North America, the Africa/Mideast and regions, and Eastern Europe. The French industry is a partic portant supplier of automatic valves, especially pneumaticall control and regulator valves, although conventional valve typ well represented.

Demand for industrial valves in France is forecast to inc 2 billion, approxima e pace, but a dece nd will be booste ill be counterbala so consumption, prevent increases in valve demand.

SAMPLE TEXT

Shipments from valve facilities in France are projected percent per year through 2011, slightly below demand, and decreasing the country's trade surplus in these products to only $10 million. By 2016, France is expected to be a small net importer of valves. Benefitting French valve production will be increases in automatic valve demand, particularly for pneumatically actuated control and regulator valves through much of the developed world. Gains will be limited to a degree by further inroads into local markets by less expensive foreign valves, dampening sales of conventional valve types.

Valve producers based in France include international producer Saint-Gobain and Vannes Lefebvre. Among the foreign firms with valve

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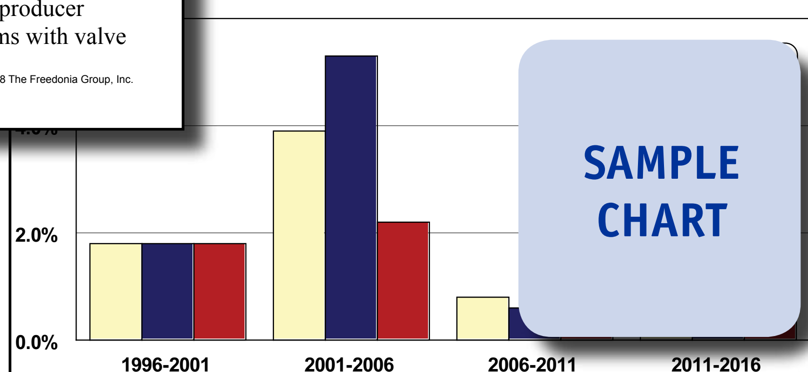
CHART II-2

RLD INDUSTRIAL VALVE PRICE INDEXES
(percent increase)



World Industrial Valves

Industry Study with Forecasts for ***2011 & 2016***

Sample Profile, Table & Chart

TABLE V-5

FRANCE - MARKET ENVIRONMENT FOR VALVES

Item	1996	2001	2006	2011	2016
Population (million persons)	5				3.6
$ GDP/capita	25				80
Gross Domestic Product (bil 2005$)	1				20
% fixed investment					).7
Gross Fixed Investment (bil 2005$)	2				).5
Primary Energy Consumption*					2.2
$ valves/capita					2.8
$ valves/000$ fixed investment					7.0
mil $ valves/quad Btu	1				5.4
Industrial Valve Demand (mil $)	1				60
% France					4.5
WE Industrial Valve Demand (mil $)	1323				25250

SAMPLE TABLE

COMPANY PROFILES

Mueller Water Products Incorporated
1200 Abernathy Road Northeast, Suite 1200
Atlanta, GA 30328
770-206-
http://ww

Sales: $
Geograp US 84%, C
14% and
Employ

SAMPLE PROFILE

Key Produ ... check, cone,
energy-dissipating valves; bronze curb, ball, check, and angle
valves; actuators; and fire hydrants

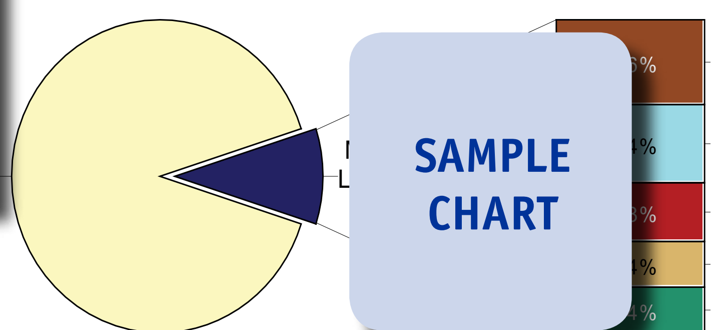
Mueller Water Products manufactures a range of water infrastructure and flow control products. The Company operates through three product segments: Mueller Co., US Pipe and Anvil.

The Company is involved in the world valves industry through the Mueller Co. segment, which generated sales of $756 million in FY 2007. The segment produces valves, fire hydrants and other products for the oil and gas; heating, ventilation and air conditioning; commercial and residential construction; and fire protection industries. Among the segment's products are butterfly, rectangular, ball, plug, check, cone, sleeve, energy-dissipating valves; bronze curb, ball, check, and angle fire plug valves; actuators; and fire hydrants, many of which are sold under the MUELLER brand name. In FY 2007, the sale of water and gas valves and related products accounted for approximately $519 million of the Company's gross trade sales, while the sale of fire hydrants and related parts accounted for $193 million of the Company's

318

CHART VIII-1

...LD INDUSTRIAL VALVE MARKET SHARE BY COMPANY, 2006
($62.6 billion)



SAMPLE CHART

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Other Studies

Water Treatment in China

This study analyzes the rapidly growing water treatment market in China. It presents historical demand data for the years 1997, 2002 and 2007, and forecasts for 2012 and 2017 by water treatment market (industrial, municipal, residential and commercial); and product (chemicals, filters, membranes, disinfection, deionization and distillation). The study also considers market environment factors, evaluates company market share and profiles leading industry players.

#2329 .... 04/2008..................... $5100

Pumps in China

Demand for fluid handling pumps in China will grow 10.5% annually through 2011. Advances will be driven by strong outlooks for pump-using markets such as process manufacturing and utilities. Centrifugal pumps will remain the most commonly used, while specialty pumps such as corrosion-resistant types will grow the fastest. This study analyzes the ¥38.1 billion Chinese pump industry, with forecasts for 2011 and 2016 by product, market and region. It also details market share and profiles major players.

#2301 .... 03/2008..................... $5100

World Water Treatment Products

Global demand for water treatment products will grow 6.4% annually through 2011. Advances will be the fastest in the developing world, especially China and India. Gains in more established markets will be driven by technology upgrades such as higher-end membranes in desalination and other uses. This study analyzes the $29.3 billion world water treatment product industry, with forecasts for 2011 and 2016 by product, market, world region and 20 countries. It also details market share and profiles major players.

#2276 .... 01/2008..................... $5800

Gears

US demand for gears will grow 3.3% annually through 2011. The best prospects will come from the aerospace industry, which will post the fastest advances. Due to the dominant size of the motor vehicle market, vehicular gear assemblies will remain the largest segment, with individual types such as helical and bevel gears leading gains. This study analyzes the $24.9 billion US gear industry, with forecasts for 2011 and 2016 by material, product and market. It also details market share and profiles major players.

#2273 .... 11/2007..................... $4400

Industrial Valves

US industrial valve demand will top $16 billion in 2011, driven by the construction and public utilities markets. Imports will approach 60% of demand. Key export markets include Canada, Mexico, Western Europe, and the Asia/Pacific and Africa/Mideast regions. Steel and alloys will remain the dominant valve material. This study analyzes the $13.9 billion US industrial valve industry, with forecasts for 2011 and 2016 presented by type and market. It also evaluates market share and profiles major manufacturers.

#2205 .... 05/2007..................... $4400

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