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Pumps in China

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

Study #2301 | March 2008 | \$5100 | 248 pages

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INDUSTRY STRUCTURE

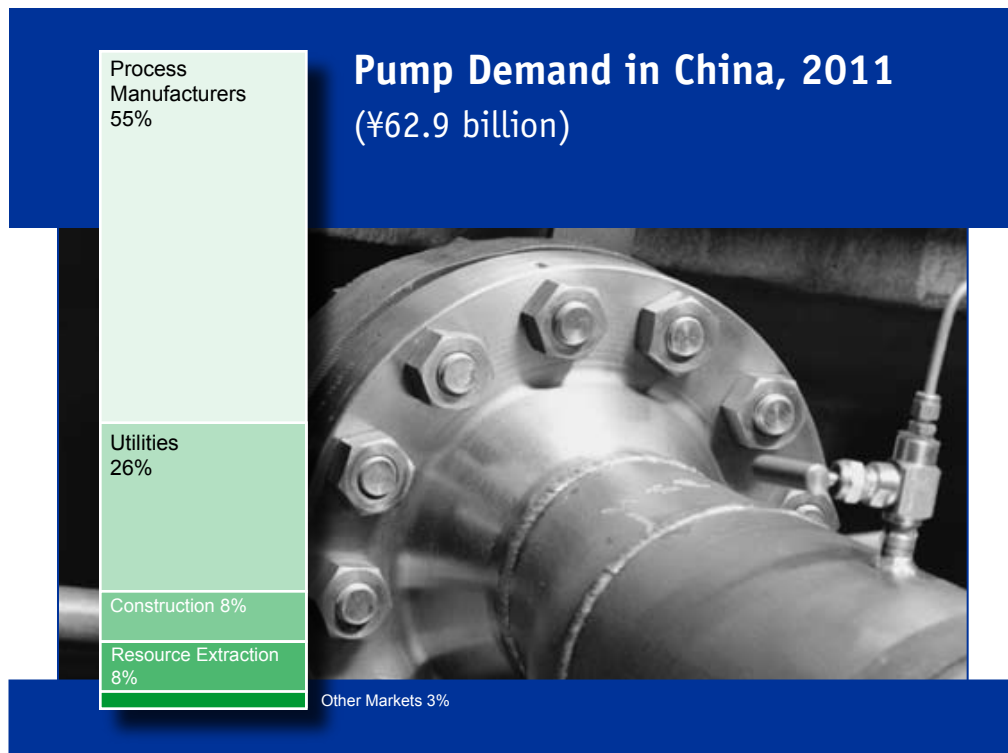
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Advances in pump demand will be driven by strong outlooks for key markets such as process manufacturing and utilities, by technological improvements and by low production costs.

Demand to grow 10.5% annually through 2011

Demand for fluid handling pumps in China is projected to increase 10.5 percent per annum through 2011 to ¥62.9 billion, outpacing growth in most other parts of the world. Advances will be driven by strong outlooks for pump-using markets such as process manufacturing and utilities. The process manufacturing market will continue to be the largest user of pumps due to the wide range of applications and significant fluid handling requirements in many of these industries. In addition, this market is expected to exhibit the fastest growth in pump demand through 2011, benefitting from expanding output in most process industries, with particularly strong gains in primary metals production. Gains will be bolstered by the continuing expansion of aftermarket prospects among process manufacturers, particularly in the chemical, primary metal, pulp and paper, and petroleum refining industries, which handle large volumes of harsh fluids. Aftermarket demand will also be supported by increasingly stringent energy-efficiency and environmental protection requirements in China.

Pump demand in the utilities segment will benefit from population growth, and further industrialization and economic expansion, which generate high demand for power and water from residential, commercial and industrial markets. In addition, public investment will boost utility pump demand in China's relatively underdeveloped western regions. The



resource extraction and construction markets are expected to see below-average gains through 2011, although the construction market will still see annual gains in excess of eight percent.

Centrifugal pumps to stay dominant, specialty types to grow the fastest

Centrifugal pumps will remain the most commonly used pump design, benefitting from their ability to handle a wide range of flow pressure, load handling capability, effective handling of liquids with high solids content, and relatively low maintenance costs. Technological innovations further improving their versatility will also drive demand for centrifugal pumps.

However, among the major pump types, specialty pumps such as corrosion-resistant types will see the fastest demand increases. Gains will be driven by the robust outlook for most process manufacturing industries in China, which are important consumers of these pumps, and stricter efficiency and safety requirements within these industries. Technological innovations will promote the use of specialty pumps, but will somewhat dampen growth in replacement demand due to associated improvements in durability. Positive displacement and turbine designs will also see strong gains, driven by increases in main end-use markets such as process manufacturing and utilities construction.

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Sample Text, Table & Chart

MARKETS

Pump Demand -- Demand for fluid handling pumps for electric power generation and natural gas utilities in China is projected to increase annually to ¥9.2 billion in 2011. However, electric utilities are in the age of their construction expansion which does not require fluid handling pumps.

**SAMPLE
TEXT**

Conventional electric power plants require massive amounts of coal, water, petroleum, natural gas and energy sources, creating critical flow control needs. In order to satisfy their fuel needs, a number of utilities are examining so-called clean coal plants, which are more intensive users of fluids -- and therefore fluid handling products -- than traditional coal fired electric generators. Pump specifications in this industry tend to be extremely rigid, usually calling for high-performance engineered pumps. This is especially true for nuclear power plants, which require special reliability and sealing characteristics as protection against radioactive fluid leaks.

Gas utilities comprise a much smaller market, with most fluid handling pump use dedicated to gas flow control functions throughout the utility's pipelines. However, the development of liquefied natural gas import terminals will create demand for additional fluid handling systems, in both the facilities themselves and in any new pipelines to connect to these terminals. In the terminals, pumps will be needed to help offload the liquified gas and move it into storage and regasification operations.

Pumps are utilized in a wide range of applications in a power plant, including boiler feed, boiler circulation, cooling water, fly ash, bottom fly ash and emissions control applications, as well as in lubrication and chemical treatment systems. For example, centrifugal, vertical turbine,

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TABLE III-2

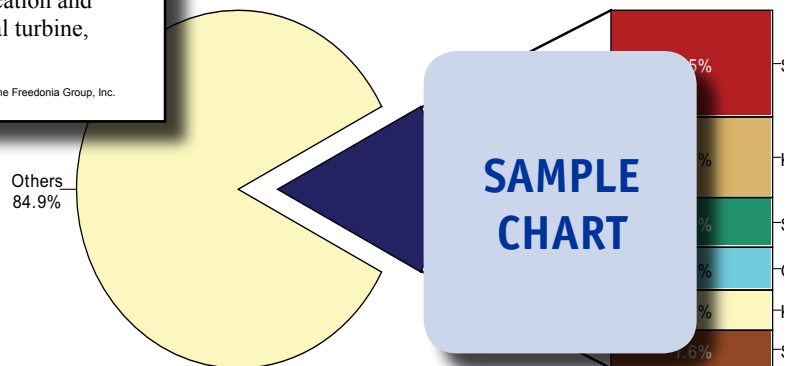
CENTRIFUGAL PUMP SUPPLY & DEMAND
(million yuan)

Item	1996	2001	2006	2011	2016
Gross Fixed Capital Formation (bil ¥)	2308	3799	8574	15650	25800
¥ centrifugal/000¥ GFCF	2.4	1.8	1.6	1.4	1.2
Centrifugal Pump Demand net exports	5400	7000	11000	16000	21750
Centrifugal Pump Shipments					
Single-Stage					
Submersible					
Other					
% centrifugal Fluid Handling Pump Shipments					

**SAMPLE
TABLE**

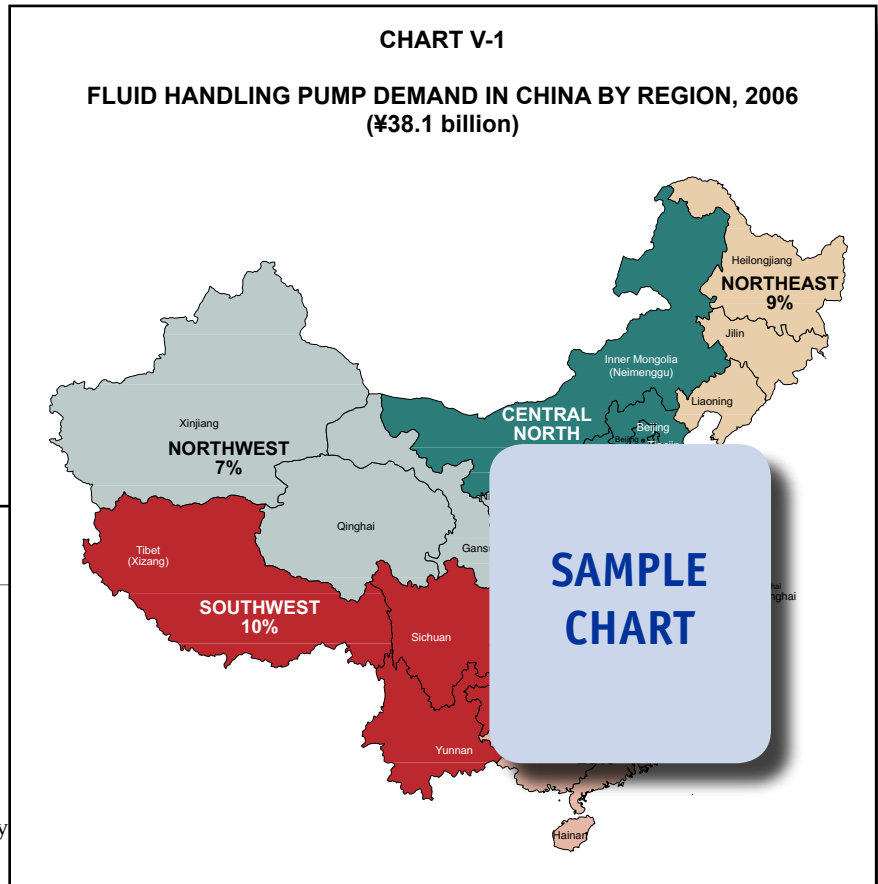
CHART VI-1

FLUID HANDLING PUMP MARKET SHARE
IN CHINA BY COMPANY, 2006
(¥38.1 billion)



**SAMPLE
CHART**

Sample Profile, Chart & Forecast



**SAMPLE
CHART**

COMPANY PROFILES

Jiangsu Yatai Pump Making Company Limited

64 Daqing Tung Road
Taixing, Jiangsu 225400
China
86-523-8765-9546
<http://www.yataipump.com>

**SAMPLE
PROFILE**

Annual Sales (2007) ¥1.2 billion
Employees 1,000
Key Products: Centrifugal pumps, submersible pumps, sewage pumps, etc.
International Sales Manager (86-523-8765-9588)

Jiangsu Yatai Pump Making is a manufacturer of pumps, pump stations, environmental protection equipment, valves and other machinery. The privately held company has a plant in Jiangsu, China and exports products to over 20 countries, including Thailand, Australia and Iran.

The Company competes in the Chinese pump industry through the production of a wide range of water pumps. Among these pumps are DAS Series, QW Series diving sewage-drained, WL Series vertical sewage-drained, QZ Series diving axial flow, QH Series mixed flow, QGL Series single-direction tubular, QGLS Series double-direction tubular, QG Series and QGW Series diving, QF Series flood prevention, SG Series deep-well water supply and QSG Series submersible deep-well water supply varieties.

“The Central-East will remain the largest regional market for pumps through 2011 with 36 percent of total national demand. The dominant position of the Central-East derives from its large share of manufacturing activity, fixed investment and construction expenditures. These factors will boost the economic outlook and sustain a vast pump market in this region. Demand for pumps in the Central-East is projected to rise 11.2 percent per year through 2011, moderating from its recent pace but remaining the most rapid in the country.”
--Section v, pg. 160-1

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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

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

Filters in China

This study analyzes the Chinese market for filters. It presents historical demand data (1996, 2001, 2006) and forecasts for the years 2011 and 2016 by product type (e.g., internal combustion engine and related filters, fluid filters, air filters); and by market (e.g., transportation equipments, industrial and manufacturing, utilities, consumer). The study also considers market environment factors, reviews filtration technology, details industry structure, evaluates company market share and profiles leading competitors.
 #2310 03/2008..... \$5100

Air Pollution Control in China

Demand for air pollution control equipment in the world's leading emitter of sulfur dioxide and other air pollutants will grow 18% annually through 2010. Particulate removal equipment will remain the largest product category and grow the fastest. Manufacturing and utilities will stay the top markets. This study analyzes the ¥30 billion Chinese air pollution control industry for 2010 and 2015 by product, market and region. The study also evaluates company market share and profiles leading industry players.
 #2163 04/2007..... \$4900

Gaskets & Seals

US demand for gaskets and seals will grow 3.6% annually through 2010. Gains will be supported by an improved economic outlook and increasing penetration of more advanced materials. Molded seals and packings, plastic gaskets, expanded graphite gaskets and metallic gaskets will grow the fastest. Aerospace will see the most rapid gains by market. This study analyzes the \$7.3 billion US gasket and seal industry for 2010 and 2015 by product and market. It also evaluates market share and profiles major firms.
 #2150 02/2007..... \$4300

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