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[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 5](#)

[Sample Text, Table & Chart 6](#)

[Sample Profile, Table & Study Coverage 7](#)

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World Industrial Valves

Industry Study with Forecasts for 2019 & 2024

Study #3369 | January 2016 | \$6300 | 519 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General.....	4
World Economic Overview.....	5
Recent Historical Trends.....	5
World Economic Outlook.....	7
World Fixed Investment Overview.....	10
World Process Manufacturing Outlook.....	12
World Energy Overview.....	15
Energy Supplies.....	16
Oil & Gas Production.....	18
Electric Power Generation.....	21
World Water Utilization Trends.....	23
World Construction Outlook.....	26
Pricing Patterns.....	28
Technological Trends.....	30
Legal & Regulatory Environment.....	32
Remanufactured Valves.....	34

OVERVIEW

General.....	36
Regional Overview.....	37
Demand.....	37
Production.....	43
International Trade.....	45
Demand by Product.....	46
Standard Valves.....	49
Multiturn.....	50
Quarterturn.....	53
Other.....	56
Automatic Valves.....	61
Control.....	63
Regulator.....	66
Actuators.....	68
Demand by Market.....	70
Process Manufacturing.....	72
Water Infrastructure.....	74
Oil & Gas.....	76
Other.....	79

NORTH AMERICA

Economic Overview.....	84
Industrial Valve Supply & Demand.....	85
Industrial Valve Market Outlook.....	89
United States.....	90

Canada.....	96
Mexico.....	102

WESTERN EUROPE

Economic Overview.....	109
Industrial Valve Supply & Demand.....	110
Industrial Valve Market Outlook.....	114
Germany.....	115
France.....	121
Italy.....	127
United Kingdom.....	133
Spain.....	139
Netherlands.....	145
Other Western Europe.....	151
Belgium.....	158
Austria.....	159
All Other.....	160

ASIA/PACIFIC

Economic Overview.....	162
Industrial Valve Supply & Demand.....	163
Industrial Valve Market Outlook.....	167
China.....	168
Japan.....	176
South Korea.....	181
India.....	187
Australia.....	194
Indonesia.....	199
Taiwan.....	206
Thailand.....	211
Malaysia.....	216
Other Asia/Pacific.....	223
Singapore.....	229
All Other.....	230

OTHER REGIONS

Central & South America.....	232
Economic Overview.....	232
Industrial Valve Supply & Demand.....	233
Industrial Valve Market Outlook.....	237
Brazil.....	238
Other Central & South America.....	244
Argentina.....	250
All Other.....	251
Eastern Europe.....	252
Economic Overview.....	252
Industrial Valve Supply & Demand.....	253
Industrial Valve Market Outlook.....	257

Russia.....	258
Poland.....	264
Other Eastern Europe.....	269
Czech Republic.....	276
All Other.....	277
Africa/Mideast.....	278
Economic Overview.....	278
Industrial Valve Supply & Demand.....	279
Industrial Valve Market Outlook.....	283
Saudi Arabia.....	284
Turkey.....	290
Other Africa/Mideast.....	295
Iran.....	302
South Africa.....	304
All Other.....	304

INDUSTRY STRUCTURE

General.....	306
Industry Composition.....	307
Market Share.....	309
Product Development & Manufacturing.....	313
Marketing & Distribution.....	315
Cooperative Agreements.....	316
Mergers, Acquisitions, & Divestitures.....	318

COMPANY PROFILES

Aalberts Industries.....	325
Alfa Laval.....	330
Aliaxis SA.....	334
AUMA Riester GmbH.....	341
AVK Holding A/S.....	343
Bröer Holding GmbH.....	349
Cameron International.....	351
China Valves Technology.....	356
China Yuanda Valve.....	358
CIRCOR International.....	359
CKD Corporation.....	365
Crane Company.....	367
Curtiss-Wright Corporation.....	372
Danfoss A/S.....	377
Emerson Electric.....	380
Festo AG.....	388
Fischer (Georg) Limited.....	390
Flowserve Corporation.....	394
Fujikin Incorporated.....	398
General Electric.....	399
IMI plc.....	402
KITZ Corporation.....	408
KSB AG.....	411

(continued on following page)

Table of Contents

(continued from previous page)

Larsen & Toubro	416
LESER GmbH	417
McWane Incorporated.....	420
Metso Corporation	422
Mueller Water Products	426
Neway Valve Suzhou Company.....	430
Parker-Hannifin Corporation.....	433
Pentair plc.....	441
PetrolValves SrL.....	446
Rexnord Corporation.....	448
Saint-Gobain.....	450
Samson AG Mess-Und Regeltechnik.....	453
SMC Corporation.....	457
SPX Flow Incorporated	458
VALVITALIA SpA	462
Velan Incorporated.....	464
Watts Water Technologies	466
Weir Group	471
Xylem Incorporated	475
Other Companies Mentioned in Study.....	477

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table	3
-----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region.....	9
2 World Gross Fixed Investment by Region	12
3 World Process Manufacturing Value Added by Product & Region.....	15
4 World Energy Production by Type	18
5 World Oil & Gas Production by Resource & Region	21
6 World Electric Power Generation by Region.....	23
7 World Nonagricultural Water Use by Region.....	25
8 World Construction Expenditures by Type & Region	28
Cht World Industrial Valve Prices, 2004-2024.....	30

OVERVIEW

1 World Industrial Valve Demand by Region	40
Cht World Industrial Valve Demand by Region, 2014.....	41
Cht World Industrial Valve Demand: Projected 2014-2019 Annual Rate of Growth.....	42
2 World Industrial Valve Shipments by Region.....	44
Cht World Industrial Valve Shipments by Region, 2014.....	45
3 World Industrial Valve Net Exports by Region.....	46
4 World Industrial Valve Demand by Product.....	47
Cht World Industrial Valve Demand by Product, 2014	48
Cht World Industrial Valve Demand: Projected 2014-2019 Annual Rate of Growth by Product	48
5 World Standard Valve Demand by Region	50
6 World Multiturn Valve Demand by Region	53
7 World Quarterturn Valve Demand by Region	56
8 World Demand for Other Standard Valves by Region	61
9 World Automatic Valve Demand by Region	63
10 World Control Valve Demand by Region	66
11 World Regulator Valve Demand by Region	68
12 World Automatic Actuator Demand by Region	70
13 World Industrial Valve Demand by Market.....	71
Cht World Industrial Valve Demand by Market, 2014.....	71
Cht World Industrial Valve Demand: Projected 2014-2019 Annual Rate of Growth by Market.....	72
14 World Process Manufacturing Valve Demand by Region	74
15 World Water Infrastructure Valve Demand by Region	76
16 World Oil & Gas Valve Demand by Region	79

17 World Demand for Industrial Valves Used in Other Markets by Region.....	83
--	----

NORTH AMERICA

1 North America: Industrial Valve Supply & Demand	87
Cht North America: Industrial Valve Demand by Country, 2014.....	88
Cht North America Industrial Valve Demand: Projected 2014-2019 Annual Rate of Growth by Country...88	
2 North America: Industrial Valve Demand by Product & Market.....	90
3 United States: Industrial Valve Supply & Demand	94
4 United States: Industrial Valve Demand by Product & Market.....	96
5 Canada: Industrial Valve Supply & Demand	100
6 Canada: Industrial Valve Demand by Product & Market.....	102
7 Mexico: Industrial Valve Supply & Demand	106
8 Mexico: Industrial Valve Demand by Product & Market.....	108

WESTERN EUROPE

1 Western Europe: Industrial Valve Supply & Demand.....	112
Cht Western Europe: Industrial Valve Demand by Country, 2014.....	113
Cht Western Europe Industrial Valve Demand: Projected 2014-2019 Annual Rate of Growth by Country.113	
2 Western Europe: Industrial Valve Demand by Product & Market.....	115
3 Germany: Industrial Valve Supply & Demand	119
4 Germany: Industrial Valve Demand by Product & Market.....	121
5 France: Industrial Valve Supply & Demand	125
6 France: Industrial Valve Demand by Product & Market.....	127
7 Italy: Industrial Valve Supply & Demand	131
8 Italy: Industrial Valve Demand by Product & Market.....	133
9 United Kingdom: Industrial Valve Supply & Demand.....	137

(continued on following page)

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List of Tables/Charts

(continued from previous page)

10 United Kingdom: Industrial Valve Demand by Product & Market.....	139
11 Spain: Industrial Valve Supply & Demand.....	143
12 Spain: Industrial Valve Demand by Product & Market.....	145
13 Netherlands: Industrial Valve Supply & Demand.....	149
14 Netherlands: Industrial Valve Demand by Product & Market.....	151
15 Other Western Europe: Industrial Valve Supply & Demand.....	155
16 Other Western Europe: Industrial Valve Demand by Product & Market.....	157
17 Other Western Europe: Industrial Valve Supply & Demand by Country.....	158

ASIA/PACIFIC

1 Asia/Pacific: Industrial Valve Supply & Demand.....	165
Cht Asia/Pacific: Industrial Valve Demand by Country, 2014.....	166
Cht Asia/Pacific Industrial Valve Demand: Projected 2014-2019 Annual Rate of Growth by Country.....	166
2 Asia/Pacific: Industrial Valve Demand by Product & Market.....	168
3 China: Industrial Valve Supply & Demand.....	173
4 China: Industrial Valve Demand by Product & Market.....	175
5 Japan: Industrial Valve Supply & Demand.....	179
6 Japan: Industrial Valve Demand by Product & Market.....	181
7 South Korea: Industrial Valve Supply & Demand.....	185
8 South Korea: Industrial Valve Demand by Product & Market.....	187
9 India: Industrial Valve Supply & Demand.....	191
10 India: Industrial Valve Demand by Product & Market.....	193
11 Australia: Industrial Valve Supply & Demand.....	197
12 Australia: Industrial Valve Demand by Product & Market.....	199

13 Indonesia: Industrial Valve Supply & Demand.....	203
14 Indonesia: Industrial Valve Demand by Product & Market.....	205
15 Taiwan: Industrial Valve Supply & Demand.....	209
16 Taiwan: Industrial Valve Demand by Product & Market.....	211
17 Thailand: Industrial Valve Supply & Demand.....	214
18 Thailand: Industrial Valve Demand by Product & Market.....	216
19 Malaysia: Industrial Valve Supply & Demand.....	219
20 Malaysia: Industrial Valve Demand by Product & Market.....	222
21 Other Asia/Pacific: Industrial Valve Supply & Demand.....	226
22 Other Asia/Pacific: Industrial Valve Demand by Product & Market.....	228
23 Other Asia/Pacific: Industrial Valve Supply & Demand by Country.....	229

OTHER REGIONS

1 Central & South America: Industrial Valve Supply & Demand.....	235
Cht Central & South America: Industrial Valve Demand by Country, 2014.....	236
Cht Central & South America Industrial Valve Demand: Projected 2014-2019 Annual Rate of Growth by Country.....	236
2 Central & South America: Industrial Valve Demand by Product & Market.....	238
3 Brazil: Industrial Valve Supply & Demand.....	242
4 Brazil: Industrial Valve Demand by Product & Market.....	244
5 Other Central & South America: Industrial Valve Supply & Demand.....	247
6 Other Central & South America: Industrial Valve Demand by Product & Market.....	249
7 Other Central & South America: Industrial Valve Supply & Demand by Country.....	250
8 Eastern Europe: Industrial Valve Supply & Demand.....	255
Cht Eastern Europe: Industrial Valve Demand by Country, 2014.....	256

Cht Eastern Europe Industrial Valve Demand: Projected 2014-2019 Annual Rate of Growth by Country.....	256
9 Eastern Europe: Industrial Valve Demand by Product & Market.....	258
10 Russia: Industrial Valve Supply & Demand.....	262
11 Russia: Industrial Valve Demand by Product & Market.....	264
12 Poland: Industrial Valve Supply & Demand.....	267
13 Poland: Industrial Valve Demand by Product & Market.....	269
14 Other Eastern Europe: Industrial Valve Supply & Demand.....	273
15 Other Eastern Europe: Industrial Valve Demand by Product & Market.....	275
16 Other Eastern Europe: Industrial Valve Supply & Demand by Country.....	276
17 Africa/Mideast: Industrial Valve Supply & Demand.....	281
Cht Africa/Mideast: Industrial Valve Demand by Country, 2014.....	282
Cht Africa/Mideast Industrial Valve Demand: Projected 2014-2019 Annual Rate of Growth by Country.....	282
18 Africa/Mideast: Industrial Valve Demand by Product & Market.....	284
19 Saudi Arabia: Industrial Valve Supply & Demand.....	288
20 Saudi Arabia: Industrial Valve Demand by Product & Market.....	290
21 Turkey: Industrial Valve Supply & Demand.....	293
22 Turkey: Industrial Valve Demand by Product & Market.....	295
23 Other Africa/Mideast: Industrial Valve Supply & Demand.....	299
24 Other Africa/Mideast: Industrial Valve Demand by Product & Market.....	301
25 Other Africa/Mideast: Industrial Valve Supply & Demand by Country.....	302

INDUSTRY STRUCTURE

1 World Industrial Valve Sales by Company, 2014.....	308
Cht World Industrial Valve Market Share, 2014.....	309
2 Selected Cooperative Agreements.....	317
3 Selected Acquisitions & Divestitures.....	321

Market advances will be driven by growth in process manufacturing output, electric power generation, and construction activity, as well as by ongoing efforts to expand and maintain water infrastructures.

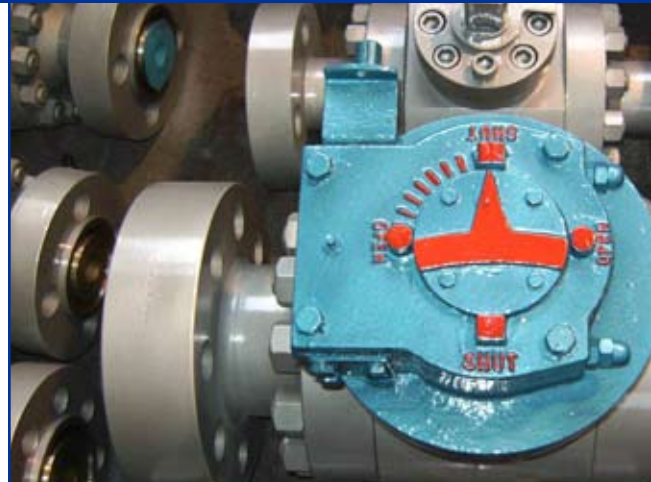
World demand to rise 4.3% annually through 2019

World demand for industrial valves is projected to climb 4.3 percent annually through 2019 to \$98.5 billion. Market advances will be driven by growth in chemicals and other process manufacturing output, electric power generation, and construction activity in a generally healthy economic environment. Ongoing efforts to expand water infrastructures in developing countries and maintain water and wastewater treatment and distribution systems in developed nations will also contribute to sales increases. Dollar gains will be boosted by greater use of "smart" valves and actuators (products that contain multiple sensors and are linked to computer networks) and other better performing, higher priced items.

Automatic valves to outpace standard types

In a continuation of historical trends, demand for automatic valves (including control and regulator valves, as well as separately sold valve actuators) is projected to grow at a faster pace through 2019 than sales of standard (conventional) hand-operated valves. Automatic valves will continue to take market share away from standard valves because of the advantages they offer, including improved safety and reduced operating costs. Automatic valves are also used in inaccessible and remote locations where manual operation is impractical. The fastest sales gains of any major product type will be posted by

World Industrial Valve Demand (\$98.5 billion, 2019)



Asia/Pacific

North America

Western Europe

Other Regions

automatic actuators, fueled by valve users' ongoing efforts to automate standard valve operation by installing automatic actuators as a less costly alternative to replacing units with automatic valves.

Developing markets to outpace developed areas

Industrial valve market growth in developing parts of Asia, the Africa/Mideast region, Central and South America, and Eastern Europe will outpace product demand in Western Europe, Japan, South Korea, and the US. China will post the strongest advances of any national market in value terms, accounting for 23 percent of all additional valve sales on a

global basis. India, a considerably smaller but still sizable valve market, will register faster gains. A number of smaller national markets -- including Indonesia, Malaysia, Thailand, and Turkey -- are also expected to record healthy sales increases. Valve demand is forecast to climb at a 3.2 percent annual rate through 2019 in the US, bolstered by growth in business investment spending as economic conditions continue to improve. Product sales in Western Europe and Japan will also expand. However, market advances in these areas will lag those in most other parts of the world, limited by below average increases in process manufacturing output and associated fixed investment expenditures.

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Sample Text, Table & Chart

ASIA/PACIFIC

South Korea: Industrial Valve Supply & Demand

South Korea is the third largest industrial valve market in the Asia/Pacific region behind China and Japan. Product demand in the nation totaled \$2.7 billion in 2014, representing 10 percent of demand regionwide. Intensity of valve use (measured against gross fixed capital formation and process manufacturing value added) is high. South Korea's large chemical, electric and water utilities, food processing, petrochemical refining, primary metals, and textile industries. In addition, South Korea is a leading producer of semiconductors, which require the use of large amounts of ultrapure water to manufacture, and one of the top shipbuilders (along with China) globally, bolstering demand for valves used in these applications. To provide one example of recent activity in the latter market, in November 2015 Parker-Hannifin announced that it had received an order to supply BESTOBELL cryogenic valves and globe valves for the cargo handling system on a liquefied natural gas carrier being built by Daewoo Shipbuilding & Marine Engineering. Industrial valve demand in South Korea doubled between 2009 and 2014, reflecting both generally healthy sales conditions in major end-use markets and a rise in the value of the *won* relative to the US dollar, which boosted product demand in dollar terms.

Industrial valve shipments from facilities in South Korea were \$1.6 billion in 2014. Although industry production climbed at a strong 7.6 percent annual rate from 2009 to 2014, it lagged growth in domestic valve sales during this span, and imports surged to meet local product requirements. In 2014, the nation had a trade deficit equivalent to 40 percent of domestic demand. Major sources of valve supply are Italy, China, the US, and Germany.

Shipments of industrial valves in South Korea are expected to increase from \$1.6 billion in 2014 to \$2.0 billion in 2019 to \$2.5 billion in 2024.

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SAMPLE
TEXT

TABLE V-4
GERMANY: INDUSTRIAL VALVE DEMAND BY PRODUCT & MARKET
 (million dollars)

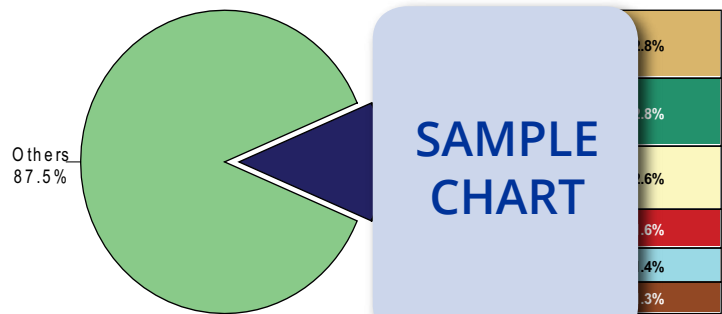
Item	2004	2009	2014	2019	2024
Industrial Valve Demand	2,100	2,500	3,000	3,500	4,000
By Product:					
Standard	1,200	1,400	1,600	1,800	2,000
Multiturn	100	120	140	160	180
Quarterturn	100	120	140	160	180
Other	100	120	140	160	180
Automatic	100	120	140	160	180
Control Valves	50	60	70	80	90
Regulator Valves	50	60	70	80	90
Automatic Actuators	50	60	70	80	90
By Market:					
Process Manufacturing	1,000	1,200	1,400	1,600	1,800
Water Infrastructure	100	120	140	160	180
Oil & Gas	100	120	140	160	180
Other	100	120	140	160	180
% Germany					
Western Europe Industrial Valve Demand	13,000	15,000	17,000	19,000	21,000

Source: The Freedonia Group, Inc.

SAMPLE
TABLE

CHART VIII-1

WORLD INDUSTRIAL VALVE MARKET SHARE, 2014
 (\$79.9 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE VII-3
BRAZIL: INDUSTRIAL VALVE SUPPLY & DEMAND
 (million dollars)

Item	2004	2009	2014	2019	2024
Gross Domestic Product (bil 2013\$)					
% fixed investment					
Gross Fixed Investment (bil 2013\$)					
Process Mfg Value Added (bil 2013\$)					
Oil & Gas Production (quadrillion Btu)					
\$ valves/000\$ fixed investment					
\$ valves/000\$ process MVA					
\$ valves/bil Btu oil & gas					
Industrial Valve Demand					
net exports					
Industrial Valve Shipments					
% Brazil					
C&S America Industrial Valve Shipments					

Source: The Freedonia Group, Inc.

COMPANY PROFILES

Xylem Incorporated
 1 International Drive
 Rye Brook, NY 10573
 914-323-5700
<http://www.xylem.com>

Revenues: \$3.5 billion in 2014
 Geographic Focus: 35% North America, 35% Europe, 30% Asia/Pacific
 Employment: 15,000

Key Products: Flow measurement, calibrated automatic valves, flow control, supply and drain valves, zone control, relief, and pressure-reducing valves

Xylem manufactures products and provides services for water and wastewater applications. The Company operates through two segments: Water Infrastructure and Applied Water.

The Company is active in the global valve industry through the Applied Water segment, which reported revenues of \$1.5 billion in 2014. Products made by the segment include valves, pumps, heat exchangers, controls, and dispensing equipment. Valves are among the products manufactured through the Applied Water segment's Building Services division, which had revenues of \$781 million in 2014.

Valves made through the division are sold primarily under the BELL & GOSSETT brand name. The BELL & GOSSETT line includes CIRCUIT SETTER PPLUS calibrated balanced valves, VENTURI balance and flow measurement valves, CIRCUIT SENTRY calibrated automatic flow limiting valves, ULTRASET manual balancing valves, HYDROTROL and CHECKTROL flow control valves, ZONETROL II

SAMPLE PROFILE

SAMPLE TABLE

STUDY COVERAGE

World Industrial Valves is a Freedonia study that presents historical supply and demand data (2004, 2009, 2014) and forecasts (2019, 2024) by product and market for six regions and 22 countries. Total supply and demand is given for an additional 7 countries. The study also considers market environment factors, evaluates company market share and profiles 42 industry competitors.

Related Studies

World Steel Pipe

This study analyzes the world steel pipe market. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by application (e.g., oil and gas OCTG, line pipe and distribution; structural, mechanical and OEM; construction; industrial and processing), world region and major country. The study also considers market environment trends and indicators, details industry structure, evaluates company market share, and profiles leading competitors.

#3362..... February 2016..... \$6200

World Gaskets & Seals

World demand for gaskets and seals will rise 5.3 percent per annum to \$70.8 billion in 2019. Growth in the machinery market will outpace motor vehicles. India will be the fastest growing national market, while China will post by far the largest advances in value terms. This study analyzes the \$54.7 billion world gasket and seal industry, with forecasts for 2019 and 2024 by market and application for six world regions and 18 major countries. Total demand is given for an additional 9 countries. The study also evaluates company market share and profiles leading competitors.

#3345..... December 2015..... \$6200

World Gears

Worldwide demand for gears will grow 6.0 percent per annum through 2019 to \$221 billion. Gear demand will expand the fastest in China and other industrializing nations, where the production of motor vehicles, motorcycles, and other durable goods will be the strongest. More use of higher tech gears will boost value gains. This study analyzes the \$165 billion world gear industry, with forecasts for 2019 and 2024 by product and market for six world regions and 19 major countries. The study also evaluates company market share and profiles industry participants.

#3320..... October 2015..... \$6300

Industrial Valves

Demand for industrial valves in the US will rise 4.9 percent yearly to \$19.8 billion in 2018. The construction market will grow the fastest, as both residential and nonresidential segments rebound at double-digit rates. However, process manufacturing will remain the largest valve market. Demand for automatic valves will outpace standard valve sales. This study analyzes the \$15.6 billion US industrial valve industry, with forecasts for 2018 and 2023 by material, product, and market. The study also evaluates company market share and profiles industry participants.

#3234..... January 2015..... \$5200

World Pumps

Global demand for fluid handling pumps is projected to increase 5.5 percent annually to \$84 billion in 2018. The Asia/Pacific region will remain the largest market and the second fastest growing, behind Central and South America. The key positive displacement and centrifugal pump segments will offer the best growth opportunities. This study analyzes the \$64.4 billion world pump industry, with forecasts for 2018 and 2023 by product, market, world region, and for 35 countries. The study also evaluates company market share and profiles industry participants.

#3231..... January 2015..... \$6500

About The Freedonia Group

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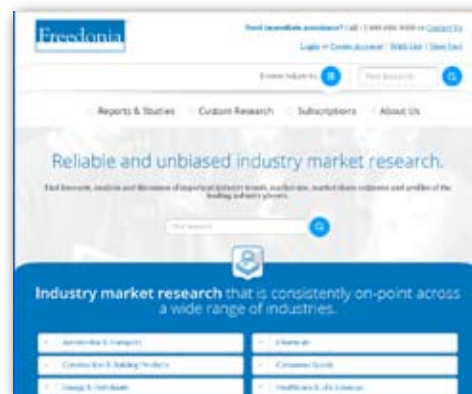
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