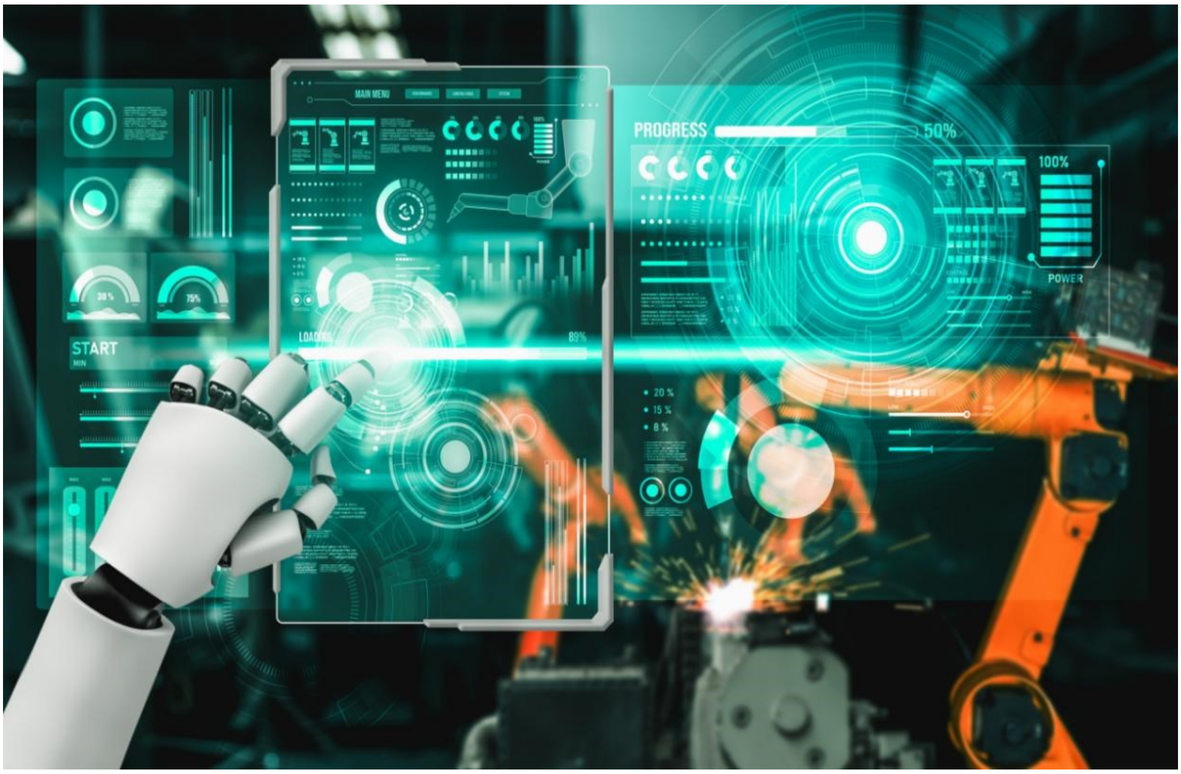
CHINA
HYDRAULIC, PNEUMATIC, AND MECHANICAL DRIVE INDUSTRY REPORT



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Ministry of Foreign Affairs
and International Cooperation

ITALIAN TRADE AGENCY
ICE - Agenzia per la promozione all'estero e l'internazionalizzazione delle imprese italiane
意大利对外贸易委员会

Premise and Disclaimer

The objective of this report is to help Italian companies further understand China's hydraulic, pneumatic, and mechanical drive industry with fundamental focus on key market development trends, competitive landscape, imports & exports and key customers. It is important to note that the report contains a number of replies from individual companies that, in some cases, may not be representative of the whole industry. There may be some cases where individual companies have experiences other than those situations illustrated in this report or experienced challenges to a degree or severity not reflected in this report.

This report has been prepared by Seymour (Shanghai Shu Shu Business Consulting Co., Ltd.), registration address is Building 1, No. 377, Nanqiao Road, Nanqiao Town, Fengxian District, Shanghai, China.

Every effort has been made to ensure the accuracy in processing, analysing, and presenting the information provided in this report. However, Seymour gives no warranty that the information in the report contains no errors. The information contained within this report is based upon primary research (e.g., interviews with hydraulic, pneumatic, and mechanical drive professionals, distributors, dealers and other industry insiders) and secondary research; some companies may be different compared to those described within this report.

In this report, Seymour uses data and statistics from official resources, e.g. China's National Statistics Bureau and Trade Data Monitor. Some data of 2022 are not available to public, which could result from that officials haven't released those data.

Seymour shall not be liable for any loss or damages suffered consequent upon the direct or indirect use of the information supplied in this report.

October, 2023
Seymour Consulting

INTRODUCTION

Objectives

- This research report is an update of the 2016 Edition of the China hydraulic, pneumatic and sealing industry report, and was conducted with the following key objectives:

    1. Provide an overview of the hydraulic, pneumatic and mechanical drive industry value chain, concerning supply and demand of key components involved in the industry process
    2. Analyze the competitive landscape, e.g., key hydraulic, pneumatic and mechanical drive product suppliers in China, and key target customers such as multinational brand product manufacturers and retailers
    3. Identify key market trends, potential barriers and opportunities for Italian enterprises interested in approaching and/or entering the Chinese market, and provide practical considerations

Conducting market research in China and our methodology

- Generally speaking, conducting market research in China is different and significantly more challenging than it is in developed countries because of 1) the size and diversity of the country; 2) lack of fully reliable centralized/official information databases; 3) constant and extremely rapid change – the whole Chinese economic system is far from being in equilibrium.

- Therefore, solid market research work must be based on multiple resources and activities.

- Our methodology leverages a combination of resources/activities such as:

    - All relevant background information (client data, existing available information, etc.)
    - Secondary research (in Chinese and English), such as several different resources, from proprietary databases to access to associations or magazines, etc.
    - Primary research, e.g. access to external business network, interviews with experts and key insiders, possible visits to trade show or selected companies, etc.
    - Collective China knowledge/sector expertise/market research expertise with hundreds of research projects executed in and outside China

Format of this report

- The report is organized in such a way as to provide various level of details in different places – executive summary, overviews, and paragraphs in the body of the report, summaries, and appendices; bullet points are used throughout the entire report to make reading easier.

Information Sources

This report is based on information sources detailed below. Therefore, there may be some cases where individual companies had different experience from those found in this report or experience from a different perspective that is not reflected in this report.

- Key sources of information for this report include:
    - All background information
    - Various secondary sources (including the *China Hydraulics Pneumatics & Seals Association*, and various websites of major industry players)
    - Interviews with industry insiders and experts
    - Ongoing Seymour analysis of all key facts and data collected

- In the report, sources are mentioned for charts, tables and key data; secondary sources include dozens of Chinese sources (news reports, magazines, publications, government statistics, etc.) as well as all companies' websites, press releases from various magazines, etc.

- We mention "Seymour Analysis" as a key reference; this refers to our elaboration and analysis of qualitative and quantitative data collected throughout the project.

- Ongoing analysis and re-elaboration of all data collected is key to cross-check data and information and identify key trends and industry dynamics.

Note for 2023 Edition

- Exchange rate: We use the exchange rate of Euro 1 = 7.8 RMB (September 2023), where appropriate throughout this report.

- This report is a high-level overview of the hydraulic, pneumatic, and mechanical drive industry in China, for easy reading with essential information for Italian enterprises operating in or intend to enter the China market; it focuses on:

    - Refreshing all general statistics and information with most up-to-date information
    - Capturing the latest key trends and market dynamics; and updating the latest import & export statistics and market position of Italy

EXECUTIVE SUMMARY

Market overview

Hydraulic Industry

- The market size of China’s hydraulic industry has grown from Euro 6.6 billion in 2016 to Euro 9.8 billion in 2021, indicating a CAGR of 6.8%. In terms of annual growth rate, the industry has achieved a steady growth rate on a yearly basis.

- Core hydraulic products include pumps, valves, motors, cylinders, and hydraulic systems and devices, of which pumps, valves, and cylinders have high technical requirements and high value. In China’s hydraulic market, the proportion of pumps, valves, and cylinders is relatively high, accounting for more than 60% of the market in 2022[1].

- From the perspective of products, China is currently self-sufficient in the low-to medium-end market, where the products are homogeneous, meaning they are similar and lack diversity in terms of product function and outlook. About 20% of the domestic production (low-to medium-end products, mostly) was for exports.

- However, limited by domestic technical standards, high-end market mostly relies on imports. 70% of China's high-end market relies on imports, which account for about 20% of total domestic demand of hydraulic products. However, imports have dropped in recent years, in particular in the high-end market segments.

- The drop in imports in the past few years was primarily because China has made efforts to improve domestic production and technology levels, and many domestically manufactured products are able to fulfil the requirements of end clients, which have largely replaced imported products.

- Driven by economic recovery and government stimulus policies such as the 14th Five-Year Plan and promotion of ‘intelligent manufacturing’, the hydraulic industry is expected to grow at a CAGR of around 7%, and the market size is expected to exceed Euro 12 billion by the end of 2023.

- The hydraulic technology itself will have the following 5 trends: energy saving, advanced control technology, automation, application of new materials, and intelligentization.

Pneumatic Industry

- The gross annual industrial output value of China’s pneumatic industry was around Euro 3.4 billion in 2021 and 3.6 billion in 2022. The industry’s growth speed has been slowing down in 2021 and 2022, which were 6.8% and 3.7%, respectively.

- With China’s efforts on upgrading the manufacturing industry and promoting ‘intelligent manufacturing’, it is expected that by the end of 2025, the industrial output value of China’s pneumatic industry will reach Euro 4.6 billion.

- China's pneumatic products can be divided into pneumatic tools, pneumatic systems, and pneumatic accessories. According to official statistics, the output of pneumatic tools is the highest among the 3 categories, at around 437,356 units in 2022[2].

[1] Data source: China Hydraulic, pneumatics, and Sealing Industry Association
[2] Data source: China Machinery Industry Yearbook 2022

- Although China's pneumatic industry has reached a certain scale and technical level, there is still a gap with the advanced international level. Some components/parts used in an automated production line are still monopolized by imports.

- In recent years, China's pneumatic exports have grown rapidly due to low product prices; thus, exports have a certain level of competitiveness in some developing countries. However, exports are mainly medium-to low-end products.

- Nowadays, pneumatic technology, combined with microelectronics technology, computer technology, control technology, and internet technology, is developing in the direction of low power consumption, small size, precious control, greenization, and intelligence.

- Digital technology will be more commonly used to be embedded in pneumatic systems; for example, the key usage of IoT is to enable a large amount of field data to have two-way communication with superiors. Besides, some algorithms are installed in the controller to achieve automated control.

Mechanical Drive Industry

- The market size of China’s mechanical drive industry has reached around Euro 133 billion in 2022[3]. In general, industry revenue has been growing at a CAGR of 9.4% from 2017 to 2022.

- The gear category occupies the largest part of around 40%, followed by chain, belt and, bearing, which are 8%, 7% and 5% respectively. The remaining other categories include couplings, clutches, brakes, etc.

- In 2022, China’s total imports of mechanical drive products reached Euro 9.8 billion, and exports were nearly Euro 18 billion.

- After years of development, China's mechanical drive industry has made great progress; a few specific products have reached the level of international players. Some enterprises actively cooperate with scientific research institutes, and their products are acknowledged by national professional institutes.

- The mechanical drive industry is in the process of accelerating transformation and emphasizing on green development. From the perspective of the market environment, the industry will leverage new technologies, such as digitalization and the internet, to improve production efficiency and service levels.

Relevant Regulations / Policies

- Relevant regulations and policies include The 14th Five-Year Plan for Intelligent Manufacturing, Made in China 2025, The 14th Five-Year Plan for Hydraulic, Pneumatic and Sealing Industry, Catalogue of Key Products and Services for Strategic Emerging Industries, The 14th Five-Year Plan for Construction Machinery, etc.

- All the regulations and policies indicate that China aims to significantly improve domestic research and development (R&D) and manufacturing capability in the hydraulic, pneumatic and mechanical drive industries especially in the high-end segments.

3 Data source: Intelligence Research Group

Competitive Landscape

Hydraulic Industry

- According to official statistics[4], as of December 2020, the number of hydraulic enterprises in China is around 1,042. The market share of the top 3 enterprises is around 14.4%, and the market share of the top 10 enterprises is less than 20%.

- About 12% of manufacturers (~125) dominate 70% of the market, and they have a relatively larger scale, each with an annual production value exceeding RMB 20 million (Euro 2.56 million).

- Foreign-invested manufacturers are mainly from the US, Germany, and Japan; the rest are from South Korea, Taiwan, and other European countries, e.g., Italy.

- Almost all the well-known international hydraulic manufacturers have already established a strong presence in China, including Bosch Rexroth (Germany), Eaton (US), Parker (US), Atos (Italy), and Hyva (The Netherlands), etc.

- Thanks to policy support and investment capital, local Chinese manufacturers have been improving their technology, R&D, and production capabilities, allowing them to move up in the value chain and narrow the gap with foreign players.

- Italian products have a relatively smaller size with a certain level of flexibility, and they are easy to install. Besides, Italian players such as Camozzi are capable of providing energy-saving and environmentally friendly solutions and products.

- Production of hydraulic products in China is mainly concentrated along the east coast regions of China, e.g., Zhejiang, Shanghai, Jiangsu, Anhui, and Shandong Provinces.

Pneumatic Industry

- Overall, the competitive landscape of China's pneumatic industry shows a character of 'a large quantity of players, a small group of quality players, and disordered competition'.

- There are over a few hundred manufacturers of pneumatic products in China; however, most of them are small-sized or family-owned enterprises.

- Among them, there are only ~30 key manufacturers; some large ones also produce hydraulic, and sealing products such as Shanghai Electric Hydraulics & Pneumatics (belongs to Shanghai Electric).

- In China, around half of the pneumatic market is occupied by foreign players. The main foreign manufacturers are SMC (Japan), FESTO (Germany), and Parker (the US), etc., among which SMC has the highest market share in China of around 40% and FESTO has around 9%.

- The rest of the market consists of domestic players of different sizes and segment focuses, however, most of them are medium-to small-sized manufacturers. There are only a few large players with in-house R&D capabilities and brand awareness.

[4] Data source: China's national statistics

- Italian brands entered the Chinese market relatively late compared to other foreign players. Chinese customers consider Italian products to have high quality and durability. However, Italian brands do relatively few marketing activities in China.

- Nowadays, domestic players are aiming to manufacture products that could replace imports. In the near future, more Chinese companies will rise to become top-tier players, and the competitive landscape is expected to change.

- Pneumatic industry clusters are mainly located in Fenghua (Ningbo of Zhejiang Province), Wuxi (Jiangsu Province), Shanghai, Leqing (Zhejiang Province), Zhaoqing (Guangdong Province), and Shenzhen (Guangdong Province), all of which account for over 90% of the industry output.

Mechanical Drive Industry

- The mechanical drive industry is a technology-intensive, capital-intensive and scale-effective industry, with a high entry barrier and a high competition barrier.

- In the gear category, the top 10 manufacturers own around 42% of the market share, among which China High Speed Transmission occupies around 10%.

- For the chain category, the market share of the top ten enterprises in China's chain manufacturing sector was 20.6%, of which Hangzhou Donghua Chain Group ranked 1st with a market share of 4.2%.

- For the belt category, the top 10 enterprises account for around 36.5% of the market share, among which Shandong Taixing Rubber ranks first with 8.8% of the market share.

- There is intensive competition between foreign and domestic players in different segments. In the high-end gear, chain, and belt segment, foreign brands such as ZF Friedrichshafen (Germany), Tsubaki (Japan), Iwis (Germany), Optibelt (Germany), SKF (Sweden) and FAG (Germany), own technical advantage and brand awareness, so they occupy a large market share.

- However, in the medium-to low-end segment, domestic companies such as China High Speed Transmission, Ningbo Donly, Hangzhou Advance, Zhejiang Shuanghuan, Ningbo Zhongda Leader, have relatively strong cost advantages and market expansion capabilities, so they have competitive advantages in the segment.

- Italy's mechanical drive parts and machinery are well known globally for their high quality and high cost performance, and mechanics is one of Italy's largest export industries. Italian companies position themselves as having high technique, high flexibility, and high cost efficiency.

- Production of the mechanical drive industry has a relatively concentrated geographic distribution. Main production locations include the east area, southwest area, southern Fujian area, and northern area.

Distribution Analysis

- As hydraulic, pneumatic, and mechanical drive are B2B industries, sales are mainly from producers directly or indirectly, e.g., agents or distributors, to corporate users. Product sales not only include the product itself but also accompany services such as installation, adjustment, staff training, and maintenance.

- There are hundreds of distributors, dealers, and agents in the market who have different operating scales and product portfolios. Some of them focus on carrying foreign brands manufactured in China; some of them trade purely imported products; and some of them carry local Chinese brands as well.

- Distributors mainly locate in Shanghai, Zhejiang, Jiangsu, and Guangdong provinces, or close to the manufacturing bases, which offer close access to manufacturers. Coastal cities provide convenient transportation and infrastructure to ship goods inbound and outbound.

- Foreign producers need distributors who have rich experience, a well-developed customer base, good communication skills, and who also understand and appreciate the product features and brand equity. Suitable distributors are vital to the initial success of market entry.

Import and Export Analysis

Hydraulic and Pneumatic Industry

- In 2022, China's total imports of hydraulic and pneumatic products exceeded Euro 4.75 billion, and exports were nearly Euro 4.56 billion.

- From 2022 onwards, imports are expected to keep steady, more in line with the overall global economic situation, driven by the slight demand growth in each of the downstream markets in China.

- From January to August 2023, imports and exports reached Euro 3.0 billion and Euro 3.01 billion respectively. Exports were slightly higher than imports.

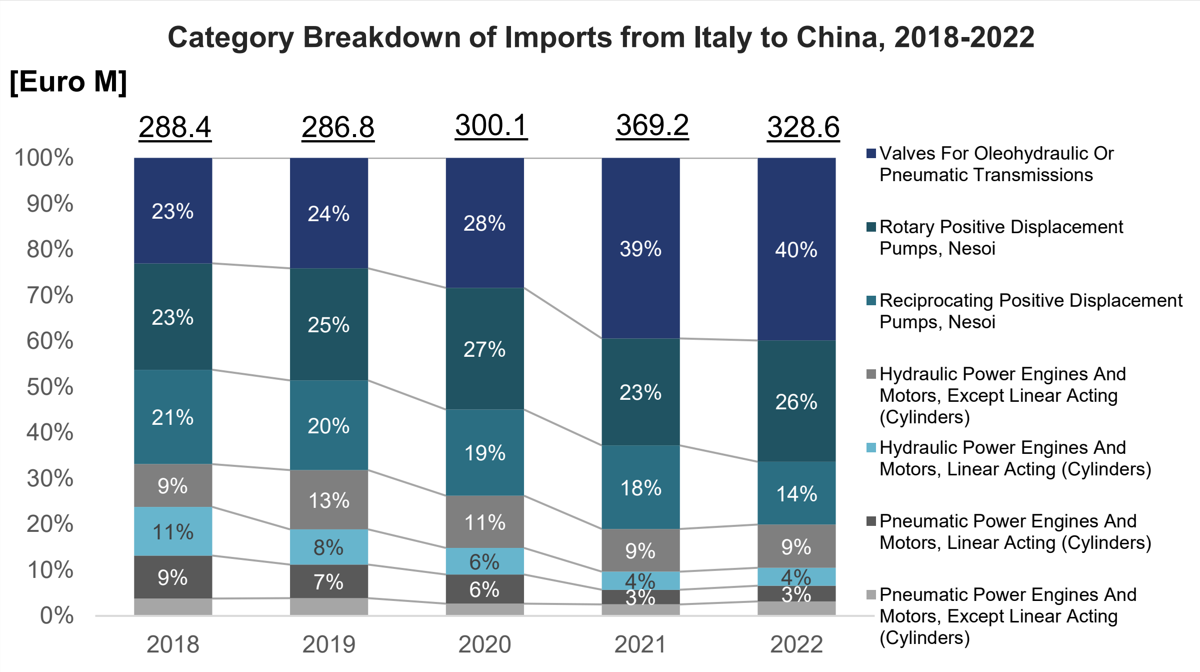
- In 2022, Italy remained #4 in total Chinese imports of pneumatic and hydraulic products, with an import value of Euro 328.6 million (7% of the total imports based on all the analysed HS codes); in the past 3 years, Italy has maintained its No.4 position and the market share of 7%.; Japan, Germany and the US were the top 3 exporters to China. The following table presents countries' ranking and share of the total.

Table: China's Pneumatics and Hydraulics Imports by Country during 2018-2022

Rank	Country	Import Value (Euro M)			%Share vs. Total			% Change
(2022)		2020	2021	2022	2020	2021	2022	21/22
-	World	4,540	5,052	4,753	100%	100%	100%	-6%
1	Japan	1,270	1,360	1,271	28%	27%	27%	-17%
2	Germany	993	1,128	1,000	22%	22%	21%	-11%
3	United States	471	507	605	10%	10%	13%	19%
4	**Italy**	**300**	**369**	**329**	**7%**	**7%**	**7%**	**-11%**
5	South Korea	339	345	220	7%	7%	5%	-36%
6	Switzerland	116	146	170	3%	3%	4%	17%
7	Taiwan	106	134	137	2%	3%	3%	2%
8	Vietnam	111	134	136	2%	2%	3%	10%
9	United Kingdom	128	111	127	3%	2%	3%	14%
10	France	70	81	81	2%	2%	2%	0%

Source: Seymour analysis on Trade Data Monitor and China Customs

- The largest category of products that China has imported from Italy was 'valves for oleohydraulic or pneumatic transmissions'(HS Code 848120), which was around Euro 131 million in 2022, accounting for around 40% of the imports. The following chart presents the import category breakdown.



Source: Seymour Analysis on multiple sources including China Customs and Trade Data Monitor

- In 2022, exports of hydraulic and pneumatic products reached Euro 4.56 billion in total, which was a 27% YoY growth. In the past 5 years, exports grew steadily each year; however, year 2020 witnessed a negative growth of -6.6%.

- In 2022, China's exports of 'rotary positive displacement pumps, nesoi' (HS Code 841360) were Euro 1.31 billion, which was the largest category, followed by 'hydraulic power engines and motors, (linear acting, cylinders) (HS Code 841221) with Euro 1.06 billion and 'reciprocating positive displacement pumps, nesoi' (HS Code 841350) with Euro 825.8 million. The remaining categories were relatively small.

- The value of exports to Italy was Euro 88.3 million in 2022, a 20.1% increase year-on-year. There was positive growth in exports from China to Italy from 2019 to 2022, except in the year 2020.

- The United States, Japan, and Russia were the top 3 target countries that China exported hydraulic and pneumatic products to in 2022. Italy occupied a very small proportion.

Mechanical Drive Industry

- In 2022, China's total imports of mechanical drive products reached Euro 9.81 billion and exports were nearly Euro 18.04 billion. From 2022 onwards, imports are expected to have minor growth or even no growth, mainly due to Chinese players' enhanced capability to produce high-end products.

- The largest category in 2022 is 'gears and gearing (except toothed wheels, chain sprockets, etc.); ball or roller screws; gear boxes and other speed changers, incl. torque converters' (HS Code 848340), which accounted for 19% of the total imports. 'Toothed wheels, chain sprockets, and other transmission elements presented separately; parts' (HS Code 848390) and 'ball bearings' (HS Code 848210) are the other 2 large categories.

- The top 3 export countries to China include Japan, Germany, and Taiwan. Italy remained #6 in total imports of mechanical drive, with an import value of Euro 355 million (4% of the total imports for all the analysed HS codes); in the past 3 years, Italy has maintained its No.6 position and the share of 4%. The following table presents countries' ranking and share of the total.

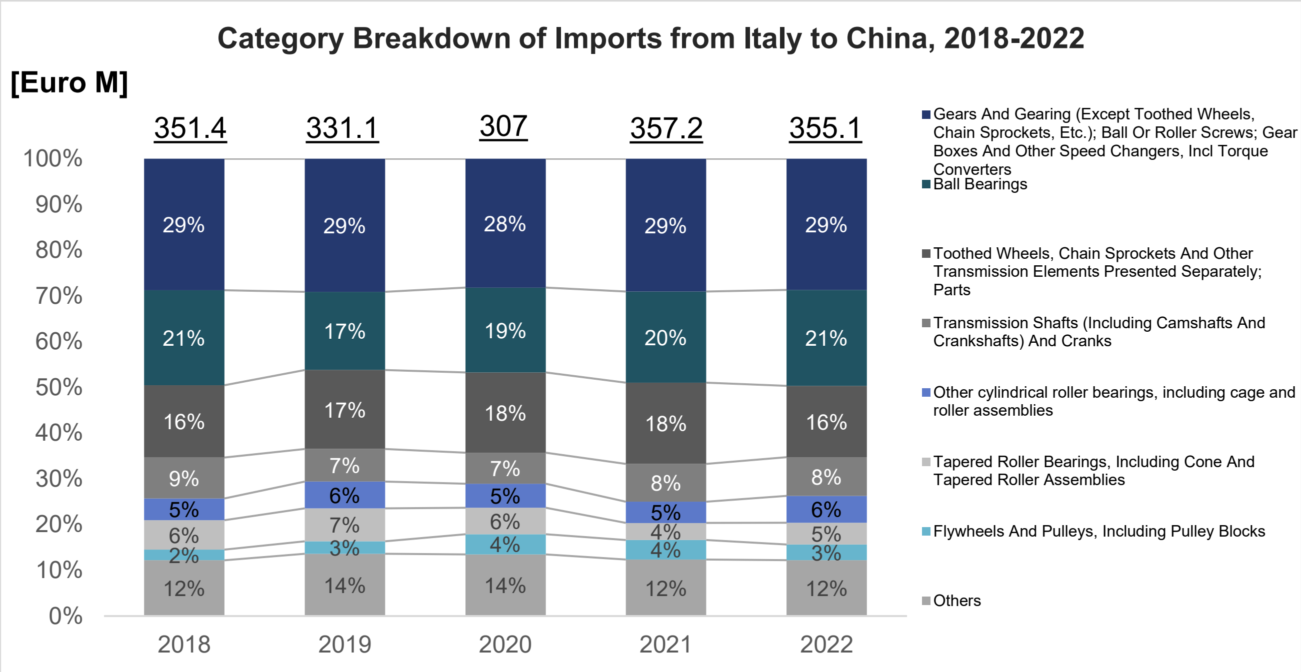
Table: China's Mechanical Drive Imports by Country during 2018-2022

Rank (2022)	Country	Import Value (Euro M)			%Share vs. Total			% Change 21/22
		2020	2021	2022	2020	2021	2022	
-	World	8,475	10,022	9,807	100%	100%	100%	-2%
1	Japan	2,082	2,504	2,405	25%	25%	25%	-4%
2	Germany	1,969	2,374	2,142	23%	24%	22%	-10%
3	Taiwan	877	1,217	1,201	10%	12%	12%	-1%
4	United States	617	664	772	7%	7%	8%	16%
5	South Korea	462	466	516	5%	5%	5%	11%
6	**Italy**	**307**	**357**	**355**	**4%**	**4%**	**4%**	**-1%**
7	France	290	331	323	3%	3%	3%	22%
8	Thailand	253	293	304	3%	3%	3%	4%
9	Romania	237	231	186	2%	2%	2%	-19%
10	Austria	153	171	185	2%	2%	2%	8%

Source: Seymour analysis on Trade Data Monitor and China Customs

- The value of China's total imports of mechanical drive products from Italy was Euro 355.1 million in 2022, which was a 0.6% decrease year-on-year and was in line with the drop in overall China imports.

- In terms of product category, the largest category of products that China has imported from Italy was 'gears and gearing (except toothed wheels, chain sprockets, etc.); ball or roller screws; gear boxes and other speed changers, incl. torque converters' (HS Code 848340) which was around Euro 102 million in 2022. It is evident that this category has ranked top in the past 5 years, and its proportion in total imports has remained at the top. The following chart presents the import category breakdown.



Source: Seymour Analysis on multiple sources including China Customs and Trade Data Monitor

- In 2022, exports of mechanical drive reached Euro 18.04 billion in total, which was 13% YoY growth. In the past 5 years, exports fluctuated; year 2020 witnessed a negative growth of -9%.
- 'Ball bearings'(HS Code 848210), 'Gears and gearing (except toothed wheels, chain sprockets, etc.); ball or roller screws; gear boxes and other speed changers, incl. torque converters'(HS Code 848340) and 'toothed wheels, chain sprockets and other transmission elements presented separately; parts' (HS Code 848390) were the top 3 export categories, accounting for 55% of total exports in 2022.
- The United States, Germany, and India were the top 3 target countries that China exported mechanical drive products to in 2022. Italy ranked #6 with a share of 5%.
- China mainly exports low- to medium-end products to those countries. Exports are expected to maintain momentum in the coming few years.

Downstream Application Industries

- The hydraulic and pneumatic industry is an upstream industry for various machinery and manufacturing industries such as construction machinery, automotive, heavy machinery, machine tools, and agriculture, etc.
- Downstream application industries of hydraulic products are mostly pillar industries of China's development. The largest downstream market is construction machinery, and this will continue to be the largest market in the near future.
- The new energy sector is developing rapidly in China and worldwide, and the spot-light segments are wind power and solar power. Hydraulic technology has extended its applications into the field of new energy, e.g., hydraulic adjustment systems for wind turbines, tracking systems for solar photovoltaics, etc.

- Pneumatic products have a wide variety of applications, suitable for downstream industries such as agricultural machinery, construction machinery, machine tools, automotive, metallurgy, medical devices, home appliances, and packaging machinery, etc. Some of the application industries are the same with hydraulic products.

- Nowadays, pneumatic technology has been applied in new areas for exploration and innovation. For example, using pneumatic technology as an intermediary to transmit signals and power in various industries, which is proven inexpensive, fast, and durable.

- Mechanical drive industry is a typical 'production-based on sales' industry. As different customers have different requirements on product specifications and scope of usage, manufacturers usually organise their production based on orders and then deliver directly to customers.

- The mechanical drive industry is closely related to various fields of the national economy, mainly serving downstream industries such as automotive, construction machinery, agricultural machinery, wind power equipment, and machine tools, etc.

- In recent years, research projects have been conducted to explore new applications of advanced mechanical drive parts. For example, there is a laboratory at Chongqing University that is experimenting with robots that can play the piano. This is a combination of mechanics and art, realised by a highly precious joint reducer to provide power transmission and facilitate movement.

Key Market Dynamics and Trends

- Domestic production of medium and high-end products replacing imports will also continue during the 14^{th} Five-Year Plan period and onwards. This is emphasized by the Chinese government.

- As hydraulic, pneumatic, and mechanical drive industries are demand-driven, upgrading downstream demand for high-end and customised products may expel small players who do not have the capabilities to catch up with market demand. Consolidation is expected to continue in the near future.

- In line with the 14^{th} Five-Year Plan and Made in China 2025 initiatives, hydraulic, pneumatic, and mechanical drive industries, which are the fundamental industries for many manufacturing sectors, will continue to be considered core development segments, which means continuous government funding in related segments.

- For intelligent manufacturing, key tasks are to improve manufacturers' production efficiency, product quality, and energy utilisation rate, and to enhance the technology level, maturity level, and competitiveness of equipment. 'Intelligent' is a key direction for manufacturing in the near future.

Considerations for Italian Players

- Since China is actively working on reviving the overall economy, all sectors are following the government's call. The recovery of different downstream industries will propel the demand for fundamental components, including hydraulic, pneumatic, and mechanical drive products.

- Italian companies that own advanced in-house technology and can provide cost-efficient products and solutions to Chinese users will definitely have business opportunities in the next few years; here, technology is the key.

- Especially in high-end market, the demand for foreign brands is higher, and some specific components or parts can't be found among Chinese brands. Here, foreign brands definitely have advantages.
- Although China is becoming increasingly strong in hydraulics, pneumatics, and mechanical drive production, and it is evident that a few leading players are able to produce high-end products, some high-end components and equipment still rely on imports, which can't be replaced by domestic ones.
- For middle to small-sized overseas Italian companies, when first approaching to Chinese market, the practice is usually to find one distributor instead of setting up an entity in China. Nowadays, it is apparently challenging to find the right distributor, as distributors are more prudent, picky, and price-sensitive, and they usually own the bargaining power.

List of Key Industry Associations

Name CN	Name EN	Address	Website	Contacts
Hydraulic & Pneumatic Industry				
中国液压气动密封件工业协会	China Hydraulic, Pneumatic & Seals Association	Room 200, Building 2, No. 1, Dewai Jiaochangkou Street, Xicheng District, Beijing	http://www.chpsa.org.cn/dist/#/index	T: 010-63172412-8015
上海液压气动密封行业协会	Shanghai Hydraulic, Pneumatic & Seals Trade Association	2188 Xinzhu Road, Shanghai	http://www.shpsa.net/	T: 021- 64551699 64556791
浙江省液压气动密封行业协会	Zhejiang Province Hydraulic, Pneumatic & Seals Association	Room 2204-2206, Building B, Zhongchuang Park, No.18 Liujiang Road, Liushi Town, Yueqing City, Zhejiang Province	http://www.zj-yqm.com/	T: 0577-62752691 E: 1196628025@qq.com
佛山市液压气动行业协会	Foshan Hydraulic, Pneumatic Industry Association	No.126, Third Floor, South China Jingu Phase I, 32 Fenjiang North Road, Chancheng District, Foshan City	http://www.fsyyqd.com/	T: 0757-88583306
宁波市液压气动密封件行业协会	Ningbo Hydraulic, Pneumatic & Seals Association	Room 1002, Wanjin Building, 892 Baizhang East Road, Jiangdong District, Ningbo City	http://www.nbhpsa.cn/	T: 0574-87247898 M: 18888658987

Mechanical Drive				
齿轮行业网	Gear Industry Association	No.81 Songshan South Road, Erqi District, Zhengzhou City, Henan Province	http://www.cgma.net.cn/	T: 0371-67710820 M: 13526657031 E: 13526657031@163.com
中国机械通用零部件工业协会	China Machinery General parts Industry Association	Room 502, Science and Technology Building, No.12 South Shouti Road, Haidian District, Beijing	http://www.cmca-view.com/	T: 010-63262092 E: china-parts@vip.163.com
杭州市机械行业协会	Hangzhou Machinery Industry Association	152 Nanshan Road, Hangzhou	http://www.hzjxhy.com/	T: 0571-89979790 E: hzjx79@126.com
中国轴承工业协会	China Bearing Industry Association	Room 309, 3rd Floor, Beijing Communications Administration, No. 4, Malian Road, Xicheng District, Beijing	https://www.cbia.com.cn/index.html	T: 010-63317635 E: hjk@cbia.com.cn

List of Key Trade Shows

Logo	**Trade Show Name**	**Location**	**Website**
PTC ASIA	**PTC Asia**	Shanghai	https://www.ptc-asia.com/
	China (Shenzhen) International Hydraulic Equipment Exhibition	Shenzhen, Guangdong Province	http://szcihe.hxmexpo.com/
HSE 2023 Show China	**Shenzhen International Hydraulic, Pneumatic and Sealing Products Exhibition**	Shenzhen Guangdong Province	http://www.hth-expo.com/
CIHPASTE 北京液压气动密封展	**Beijing International Hydraulic, Pneumatic and Sealing Technology Exhibition**	Beijing	N/A

SIAP	**Shanghai International Air Compressor and Pneumatic Technology Exhibition**	Shanghai	N/A
IAT EXPO	**Shanghai International Intelligent Industrial Assembly and Automation Exhibition**	Shanghai	N/A
SIA	**Shanghai International Industrial Automation & Robotics Exhibition**	Shanghai	http://www.sia-robot.com/
SIA	**Shanghai International Power Transmission and Control Technology Exhibition**	Shanghai	http://www.asia-pte.com/
GTR 2024Show China	**China (Shanghai) Gear Transmission and Reducer Exhibition**	Shanghai	http://tuanlegou.sstcf.com/index.asp
GTR 2024Show China	**China (Ningbo) International Gear Transmission and Reducer Exhibition**	Ningbo, Zhejiang Province	http://www.jgjsznexpo.com/

Source: Seymour analysis based on multiple sources including websites

意大利对外贸易委员会 Italian Trade Agency

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