

# China Waste Heat Utilization Equipment Industry Report, 2009-2010

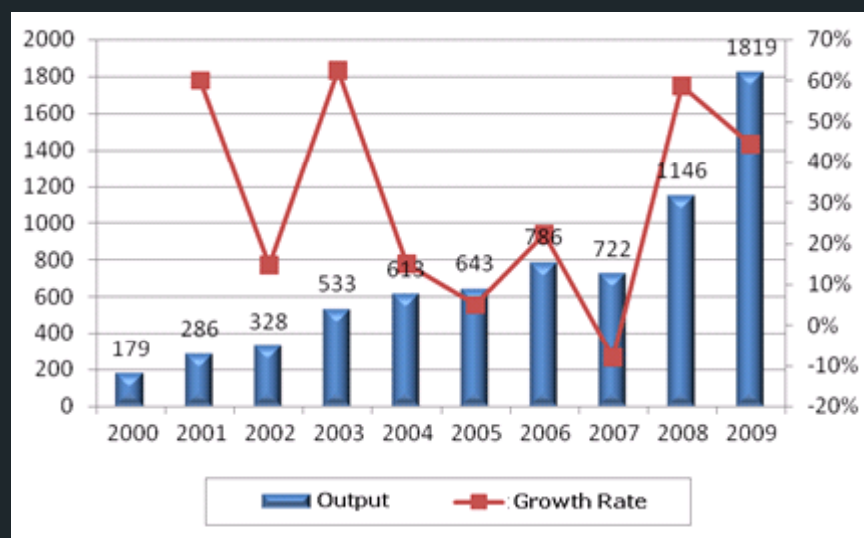


Fueled by national policies relevant to energy conservation and emission reduction as well as the improvement of energy utilization efficiency, China's waste heat utilization equipment industry has developed rapidly during the recent years.

Take waste heat boiler as an example. From 2000 to 2008, the average annual growth rate of China's waste heat boiler output was 26.1% (by set) and 35.8% (by steam tonne). Under the drive of both the policy of expanding domestic demand and the policy of energy saving & environmental protection, China's output of waste heat boiler maintained a steady double-digit increase in 2009, hitting 1819 sets and 38824 steam tonnes respectively.

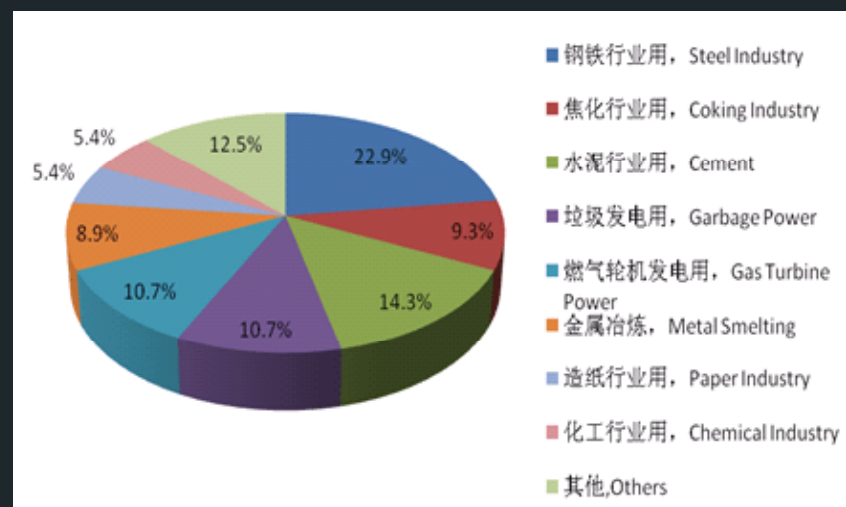
However, China's current waste heat utilization rate remains low: it is only 30%~50% of large-scale iron and steel enterprises, and even lower of other industries. Based on the enhancement of national energy saving & emission reduction policy as well as the development of downstream sectors, Chinese market capacity of waste heat boiler will reach RMB28 billion or so in the following 5 years, of which those big energy consumers such as iron & steel and cement will still be the main consumption market of waste heat boiler with a respective share of 22.9% and 14.3%.

### China Waste Heat Boiler Output and Growth Rate, 2000-2009 (Sets)



Source: ResearchInChina

## China Waste Heat Boiler Market Structure in the Next 5 Years



Source: ResearchInChina

Apart from the emphasis on the operation environment, current development, market size, competition pattern, current application and development prospect of China's waste heat utilization equipment industry like waste heat boiler, LiBr absorption chiller (heat pump), etc., this report also analyzes the development & operation of key related enterprises and their development advantages in waste heat utilization equipment.

Take Hailu Heavy Industry Co., Ltd. as an example. It is the leading enterprise of waste heat boiler in China with the market share as high as 50.6%. The company stays ahead in such segmented markets as coke dry quenching waste heat boiler, oxygen converter waste heat boiler, and non-ferrous metallurgy waste heat boiler with the market shares of 94%, 70%, and 70%, respectively. Because of the relatively high technical threshold of waste heat boiler industry and the company's brand awareness, Hailu Heavy Industry will continue to dominate the field.

Along with the productivity release of the technology reformation project of highly efficient waste heat boiler manufacturing and market expansion of newly developed vessel products, in Year 2009, the operating revenue of the company reached RMB980 million, up 30.1% yr-on-yr; the net profit was RMB130 million, up by 44.4% yr-on-yr; and the gross profit margin of waste heat boiler products grew 2.3 percentage points to 23.9%.

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