China Solar Water Heater Industry Report, 2011

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind, and European Solar Thermal Industry Federation etc.

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Abstract

Solar heat utilization is seeing an increase worldwide, especially in China. **In 2010, China's output of solar water heaters grew roughly 16.7% to 49 million square meters, accounting for about 70% global share; the total ownership was approximately 168 million square meters, sharing about 63.8% globally. In 2011, the output reached 57.6 million square meters or so, a YoY increase of roughly 17.6%.**

Currently, there are about 200 standard-compliant solar water heater enterprises and about 1,000 small-scale ones; the market concentration of brand enterprises is still not high, with less than 25% market share taken by top 10 enterprises in the industry. However, despite all that, the industry concentration shows an ascending tendency year by year. By dint of "Home Appliances Going to the Countryside" project, there appeared two brands with annual output and sales volume each exceeding two million units in 2010, namely, Sunrain and Sangle.

China Solar Water Heater Industry Report, 2011 by ResearchInChina mainly involves the following content:

- Current development of global and China solar water heater industry, covering market size, competition features and structure;
- Analysis on output and demand of China solar water heater industry, and forecast on market size in 2012-2015.
- Analysis on export of China solar water heater industry;
- Research on China's key solar water heater manufacturers, referring to operation and product development of nine enterprises such as Himin, Sangle and Sunrain.

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Sunrain Group is one of China's largest solar water heater brands, with annual output and sales volume each outnumbered two million as of the end of 2010. According to official statistics of "Home Appliances Going to the Countryside" project, Sunrain Group accounted for 21.28% of the total sales volume of solar water heaters involved in the project in 2010. Sunrain Group's strategy for 2012 involves exploring new markets (including cities and overseas) while consolidating the market share occupied through "Home Appliances Going to the Countryside" project.

The annual output and sales volume of **Shandong Sangle Solar Energy Co., Ltd.** each reaches more than two million units now, in addition to Jinan Headquarters, its bases in Zhejiang, Hunan, Jiangsu and Shaanxi have already been completed and put into operation, and bases in Henan, Liaoning, Sichuan and Jinan are under construction. Sangle Solar Energy plans to build up eight production and logistics bases nationwide before 2013, and realize annual capacity of 10 million units by 2015.

Possessing brands Himin and Ecoosolar, **Himin Solar Corporation** has always been the leading brand of China solar water heater industry. The company's annual promotion of heat collectors exceeds three million square meters, and its products chiefly take a high-end intelligent route. In 2011, Himin Solar Corporation launched MePad, which integrates and utilizes a variety of solar energy-based clean energy solution technologies and Internet of Things technologies for energy-saving transformation and management, to minimize users' energy consumption and emissions in production and life.

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