



Global and China Solar Water Heater Industry Report, 2013

Jan. 2013

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.

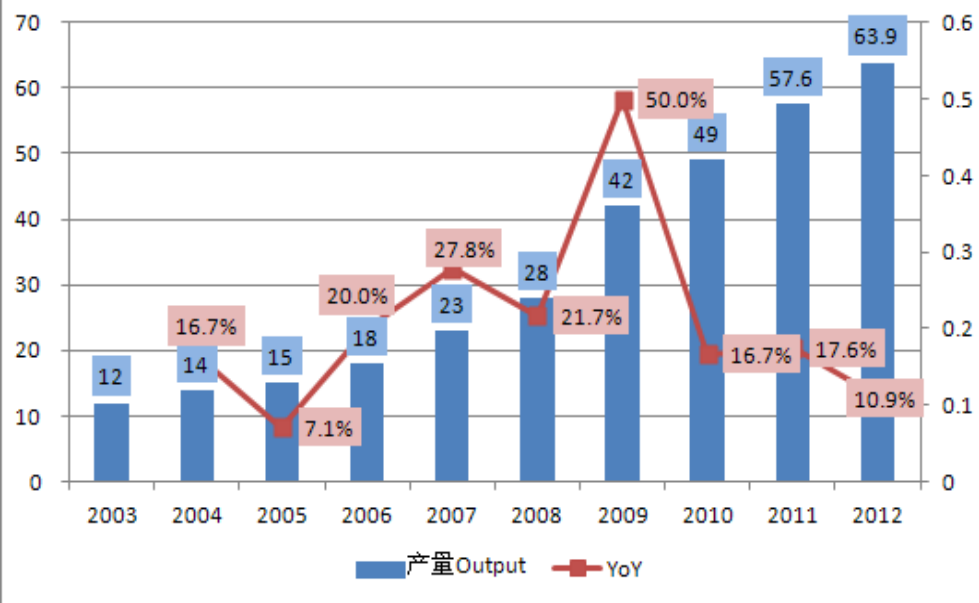
INFORMATION SOURCES

The primary information sources include Company Reports, China Customs, and National Bureau of Statistics of China etc.

Abstract

Solar heat utilization has seen rapid development around the world by virtue of easy realizability, with the growing scale of application, especially in China whose solar water heater production has risen to 63.9 million square meters in 2012 at a growth rate of 10.7% or so, with total inventory of roughly 258 million square meters.

Annual Output of Solar Water Heater in China, 2003-2012 (mln sq.m.)



Source: National Bureau of Statistics of China,

ResearchInChina *Global and China Solar Water Heater Industry Report, 2013*

Although China's solar water heater industry has maintained a momentum of fairly rapid growth in output, sales volume and inventory over the past two years, it seems not very optimistic for years to come. In terms of market segments, the retail market will slow down growth or usher in short-term adjustment following the retreat of the four-year "Home Appliances Going to the Countryside" policy; in consideration of the ambiguous prospect for the world economy, it is also tough for the export market to make achievements; yet only the engineering market currently in its introduction stage will keep high-speed progression.

As yet, there have been about 200 solar water heater machine enterprises and 1,000 small-sized firms in compliance with requirements; brand players still have a low market concentration degree, and the market occupancy of the top ten companies is less than 25%. In spite of this, the industry concentration is showing an upward trend year after year. The industry is gradually divided into three major factions, i.e. first, the optothermal industry leader, consisting of Solareast Corporation, Himin Solar Corporation and Solar Energy Co., Ltd. Shandong Sang Le; second, the industry's leading faction, composed of Linuo Paradigma, Sunshore Solar Energy Co., Ltd, Jiangsu Huihuang Solar Energy Joint Stock Co., Ltd., Tsinghua Solar Systems Ltd., Huayang Solar Energy Group Co., Ltd., Beijing Tianpu Solar Energy Industry Co., Ltd, etc.; third, the active faction occupied by Jiaxing City Tjsun New Energy Co., Ltd., JiangSu YuanSheng Solar Group, Dr.Xia Solar, Changzhou Sunlight Solar Energy Co., Ltd., Shandong Muyang Solar Energy Technology Co., Ltd., etc., dominated by flat-panel products.

The Global and China Solar Water Heater Industry Report, 2013 of ResearchInChina mainly covers the followings:

- ※ Development of global solar water heater industry, referring to the industry status quo, market scale, development trends, etc. of the world and major optothermal-using countries.
- ※ Development of China solar water heater industry, covering industry status quo, market size, business model, competitive features, exportation, sector planning, anticipated future trends, and so forth;
- ※ Analysis on key manufacturers in China, involving the operation and development of Solareast Corporation, Solar Energy Co., Ltd. Shandong Sang Le, Himin Solar Corporation, etc..

Solareast Corporation has established three production bases in Jiangsu, Shandong and Henan provinces, currently with solar water heater capacity exceeding three million units, and product sales blanketing over 30 provinces domestically and nearly 100 countries and regions overseas, thus surpassing Himin Solar Corporation to be the industry leader.

Himin Solar Corporation had been dominating the industry prior to 2010. Although it has carried out diversification in recent years, the situation has proved less than ideal; moreover, it has encountered the third failure in the capital market in 2012.

Solar Energy Co., Ltd. Shandong Sang Le has been moving steadily in the step-by-step advancing of its Nine Production Base Strategy. As of the end-2012, it had completed the construction of six production bases to form solar water heater production capacity of seven million

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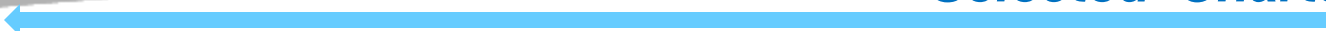
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