



China Waste Heat Utilization Equipment Industry Report, 2013-2015

Sep.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, and National Bureau of Statistics of China etc.

Abstract

China has rich waste heat resources. Especially in steel, nonferrous, chemical, cement, building materials, oil & petrochemical, light industry, coal and other sectors, waste heat resources approximately occupy 17%-67% of the total fuel consumption, of which, recyclable waste heat resource roughly stand up 60% of the total waste heat resources. At present, China's waste heat utilization ratio is rather low, with the figure in large steel enterprises being 30%-50%. But the waste heat utilization in other sectors is even lower. Thus, China is expected to see a huge potential to improve its waste heat utilization.

By temperature of waste heat, the waste heat utilization equipments fall into two categories: the first comes to waste heat boiler which uses medium-and high-temperature waste heat; the second refers to lithium bromide refrigerator (heat pump) and screw expander, both of which use low-temperature waste heat. Of these, waste heat boiler occupies a lion's share in waste heat utilization equipments. In 2012, the output of waste heat boiler approximated 812 sets, totaling 39,788 steam tons.

According to the 12th Five-Year Plan On Energy Conservation And Emission Reduction by the State Council, China will increase its capacity of waste heat/pressure power generation by 20 million KW as of 2015, expecting to save 57 million tons of coal equivalents. The release of the planning injects new development motives for the waste heat utilization field, leading to the development of low-temperature waste heat utilization equipments represented by lithium bromide refrigerators and screw expanders.

When it comes to lithium bromide absorption device, Chinese market capacity reached RMB3.32 billion in 2012, with leading industrial players including Yantai EBARA, the market occupancy of which realizes 27%, far above Shuangliang Group and Henan Yuanda Boiler.

The screw expander industry is at a stage for promotion in China and beyond, with major domestic industrial players including Jiangxi Huadian Electric Power, Kaishan and Shanghai Hanbell Precise Machinery. In particular, Jiangxi Huadian Electric Power was the first involved in the production of screw expanders. And its first screw expander was put into use in 2002. Thus far, its screw expanders' power range from 50KW to 1,500KW, and the application in fields like electricity, steel, smelting, petrochemical and light industry has exceeded 60 sets.

The report highlights the followings:

- ✘ Overview of China waste heat utilization equipment industry, including development history, polices and regulations, market scale, status quo and development outlook;

- ✘ China waste heat utilization equipment market segments, including market size, competition pattern and development tendency;

- ✘ 10 industrial players such as Suzhou Hailu Heavy Industry, Hangzhou Boiler Group, Yantai EBARA, Shuangliang Group, Jiangxi Huadian Electric Power, Kaishan, Shanghai Hanbell Precise Machinery in terms of profile, fiscal data, capacity distribution, product strength and latest development strategy.

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