



# China Household Water Purifier Industry Report, 2013-2016

Nov. 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.

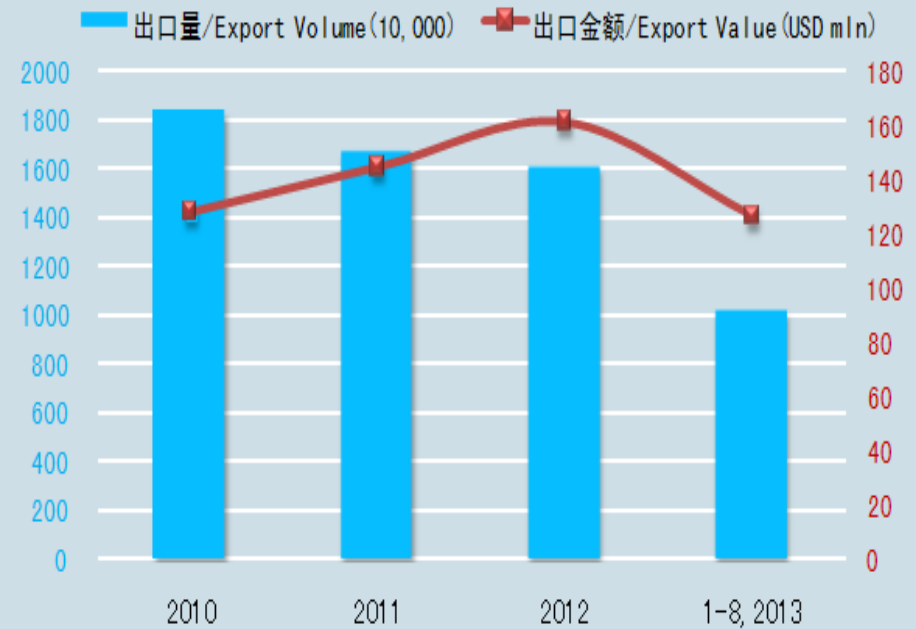
## Abstract

The frequency of water pollution incidents arouses public's growing concern over the quality of drinking water, calling for increasingly demanding quality of drinking water. Thus, the household water purifier market has got boosted. In 2008-2013Q1, China household water purifier market kept growing by more than 30%.

As of late 2012, the scale of China household water purifier market approximated RMB15 billion, with low- and medium-range products such water purifier as mainstream priced at roughly RMB2, 300 on average. As China water purifier market is witnessing an improving environment, the industry is expected to be regulated progressively and grow towards mid-and high-range tide.

Thus far, there are many industrial players in the regard in China. But most of them are small and micro businesses. In China's household water purifier market, a few of big shots such as Midea, Qinyuan and Angel Group are occupying a lion's share. Among the top 10 homegrown water purifier brands in 2012, the market share of the top 4 stood at a combined market share over 79%. In particular, Midea water purifier swept the market share of 29.93%, topping the list by retail volume.

Export Volume /Value of Household Water Purifier Equipments in China, 2010-2013



Source: China Customs; ResearchInChina

The report highlights the market scale, import & export, price and competition pattern, and channel development of China household water purifier industry, and studies three foreign companies including Pentair, Coway and Ecowater Systems Ltd., as well as 12 domestic peers like Midea, Shanghai Canature Environmental Products Co., Ltd., Beijing Origin Water Technology, Qinyuan, Angel Group and Sacon Group.


Water treatment equipments of Shanghai Canature Environmental Products cover household and commercial water treatment products with the brands of Canature and Bentair. As of late 2012, the annual capacity of water treatment equipment assembly and parts hit 240,000 sets/units. Thus far, the company's intelligent household whole house water treatment equipment, commercial water dispenser and the kit and supporting utility facilities are under construction and, it is expected to achieve the full capacity in late March of 2014.

At present, the company's ancillary products are "Origin Water" water purifiers which are mainly produced by its holding subsidiary-Beijing Originwater Technology Co.,Ltd. with the annual capacity approximating 500,000 sets in 2010. In the first half year of 2013, the revenue from water purifier sales business of the company skyrocketed by 440.14% year-on-year to RMB37.5826 million.

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