



**China Industrial Boiler Industry
Report, 2013-2015**

Nov. 2014

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

With steady progress of industrialization and urbanization, industrial boiler output keeps growing in China, which hit 512,700 t/h in 2013, surging by 16.71% year-on-year, and posting a CAGR of 16.3% during 2007-2013. China's boiler ownership and capacity both rank No.1 around the world and most boilers in service are industrial coal-fired ones.

Constrained by national emission reduction targets, small coal-fired boiler is trapped. The production and demand of small and medium-sized coal-fired boiler suffers decline, while that of large-capacity clean fuel-fired boiler picks up. Besides, great importance is attached to boiler technologies and products covering coal water slurry-fired boiler, waste incineration boiler, biomass boiler, waste heat and exhaust gas recovery boiler, condensing boiler, etc., thus lifting the overall performance of boiler products.

There are over 5,000 boiler producers in China, involving more than 500 Grade A companies, around 800 Grade B ones, about 2,000 Grade C ones and above 1,600 Grade D ones.



Industrial boiler has lower manufacturing qualification requirements than power station boiler (which must be Grade A), which explains why such a large number of producers are concentrated in the industrial boiler area, e.g. Taishan Group, Jianglian Heavy Industry, Hangzhou Boiler, Nantong Wanda, Anhui Jinding Boiler and others.

Amid the aforementioned companies, Taishan Group covers almost all the industrial boiler products, power station boilers, etc.; Jianglian Heavy Industry mainly focuses on waste heat boiler, circulating fluidized bed and the like; Hangzhou Boiler is an A-share listed company, specializing in power station boiler, waste heat boiler and some industrial boilers, followed by Nantong Wanda, Anhui Jinding Boiler, Jiangsu Taihu Boiler, Wuxi Zosen Boilers, Jiangsu Shuangliang Boiler, Wuxi Taihu Boiler and Hongguang Boiler, all of which, with enriched product mix, are all qualified for boiler manufacturing of above Grade B.

China Industrial Boiler Industry Report, 2013-2015 highlights the followings:

- Overview of China industrial boiler industry, including definition and classification, development course, policies and regulations, market size, regional market, import & export, competitive landscape, development trend, etc.;
- Market size, demand model, development trend, etc. of major market segments such as steam boiler, hot-water boiler, organic heat carrier boiler, etc.;
- Profile, financial situation, output and sales volume, major clients, featured products, R&D, production base distribution, technical features, etc. of 21 major domestic producers consisting of Taishan Group, Jianglian Heavy Industry, Hangzhou Boiler, Nantong Wanda, Anhui Jinding Boiler, Jiangsu Taihu Boiler, Wuxi Zosen Boilers, Jiangsu Shuangliang Boiler, Wuxi Taihu Boiler, Hongguang Boiler, Tianjin Baocheng Machinery Group, Bright Thermal Equipment, Hengtao Group, Zhengzhou Boiler, Kaifeng Desheng, Guangzhong Group, Changzhou Energy Equipment, Devotion Thermal Facility, Dalian Boiler, Xineng Boiler, China Western Power Industrial, etc.

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