



**China Heat Meter Industry  
Report, 2014-2018**

**Jan. 2015**

## 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

Heat meter, also called energy meter, is an instrument for measuring, calculating and displaying calorie value released or absorbed by heat exchange system (including central heating and air conditioner). In Feb. 2010, the Ministry of Housing and Urban-Rural Development, National Development and Reform Commission, Ministry of Finance and General Administration of Quality Supervision, Inspection and Quarantine issued Opinions on Further Promoting Reform of Heat Metering, asking that “from the beginning of 2010, the model of charging based on area is to be replaced by the one based on heat quantity for newly-built buildings and existing buildings that has completed heat metering renovation in northern regions with heating provision.” Since 2010, heat meter market has developed rapidly.

At present, the demand for heat meter in China comes from two aspects: heat meters for newly-built buildings and the ones for heat metering renovation of existing buildings, both in northern regions. For the former, new floor space adopting heat meters in northern regions totaled 323 million m<sup>2</sup> in 2013, accounting for 79% of newly-completed floor space. New buildings in Shandong, Hebei, Xinjiang and Tianjin were mounted with heat meters.

Regarding heat meters for existing building renovation, special funds of more than RMB16 billion from central government were earmarked to complete heat metering and energy efficiency revocation for 550 million m<sup>2</sup> existing buildings during 2007-2012, and special funds of RMB7.1 billion were used to support renovation of 224 million m<sup>2</sup> in 2013. As of the end of 2013, about 3 billion square meters of buildings needed heat metering renovation in northern regions with heating provision. In the future, the market of heat meter for buildings with heat metering renovation will be huge.

Currently, there are more than 300 heat meter producers in China, 80% private ones, represented by Weihai Ploumeter, Jiangsu Metter Smart Meter, Beijing Tian Ruixiang Equipment, Tianjin Guangdaweiye Measurement Instrument Tech, Tangshan Huizhong Instrumentation, WECAN Precision Instruments, Suntront Technology, etc.

Tangshan Huizhong Instrumentation mainly manufactures ultrasonic heat meters, including household ultrasonic heat meter, building ultrasonic heat meter and industrial ultrasonic heat meter. In the first half of 2014, the company made revenue of RMB40.93 million from ultrasonic heat meters, up 20.3% from a year earlier, accounting for 57.7% of its total revenue. In Jan. 2014, the company raised funds for “ultrasonic heat meter industrialized production base construction” and “large-caliber ultrasonic water meter industrialization” projects. The company will boast household ultrasonic heat meter capacity of 600,000 units and ultrasonic heat meter capacity of 33,000 units when the projects reach designed capacities.

Foreign brands in the Chinese market now consist mainly of Danfoss, Diehl, Landis+Gyr, Kamstrup, Zenner, Engelmann, Itron, Ista, etc, of which Danfoss, Diehl, Landis+Gyr and Kamstrup entered the Chinese market earlier.

Danfoss has two companies in China that engage in heat meter business, namely, Danfoss (Tianjin) Limited and Danfoss (Shanghai) Automatic Controls Ltd., which were established in Sept. 1995 and Oct. 2001, respectively, with the former, besides manufacturing heat meters, also buying heater meters without brand and trademark from Tangshan Huizhong Instrumentation and selling them under its own brand name, and the latter importing heat meters from the Danish parent company and selling them in China.

Diehl (officially renamed Diehl Metering in Oct. 2014) operates heat meter business in China through Diehl Metering (Jinan) Co., Ltd. (former Hydrometer (Shandong) Metering Co., Ltd), which was established in Dec. 2004, has heat meter production base and engages in heat meter import & export and sales businesses, and contributed revenue of around RMB250 million in 2013.

China Heat Meter Industry Report, 2014-2018 covers the following:

- Overview of heat meter industry (including definition, classification, composition structure, heat metering methods, industrial chain);
- Development environment for heat meter industry (including policy, industrial characteristics, business model, development prospect);
- Operation of heat meter market (containing market status quo, area of heat-supply service, area of fee collection by heat metering, heat meter market size, competitive landscape)
- Major global heat meter producers (including Techem, Ista, Danfoss, Diehl Metering, etc.);
- Major Chinese heat meter producers (embracing Tangshan Huizhong Instrumentation, Suntront Technology, WECAN Precision Instruments, Weihai Ploumeter, Jiangsu Metter Smart Meter, etc.)

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  - 1.1.1 Definition
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