

# China Heat Meter Industry Report, 2016-2020

Nov. 2016

## **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 thermal energy meter, is a device for measuring, calculating and displaying calorific value released or absorbed by heat exchange system. In China, heat meters are mainly used for central heating in northern areas for the purpose of energy efficiency.

Since 2010, more and more cities have further promoted and installed heat meters aggressively as China's energy saving & emission reduction and heating metering reform continues. As of the end of 2015, Northern China had installed 31.83 million heat meters accumulatively, an increase of 18.7% over last year and 4.9 times that at the end of 2010.

New increment mainly comes from two aspects: heat meters for newly-built buildings and the ones for heat metering renovation of existing buildings. In 2015, heat metering and energy saving renovation of existing buildings in Northern China was involved with 160 million square meters, a year-on-year decrease of 50 million square meters. Meanwhile, China's real estate tightening made new construction area in Northern China fall 13.9% YoY in the same year, which led to a significant decline in installation of new heat meters herein compared with previous years; about 5 million new heat meters were installed in this region in full year of 2015.

In February 2016, the State Council issued Several Opinions of CPC Central Committee and State Council on Further Strengthening Urban Planning, Construction and Management to require clearly that “residential heating metering by household” should be vigorously promoted in heating regions, all new residential housings must adopt this metering model, the existing residences should adapt to this model progressively. Driven by the policy, the cumulative installation of heat meters in Northern China is expected to grow at over 13% during 2016-2020.

Currently, there are more than 300 heat meter producers in China, of which more than 25 ones can produce over 200,000 heat meters annually. Weihai Ploumeter, Jiangsu Metter Smart Meter, Beijing Tian Ruixiang Equipment, Tianjin GuangDaWeiYe Measuring Instrument Technology, etc. sell more than 300,000 heat meters each year.

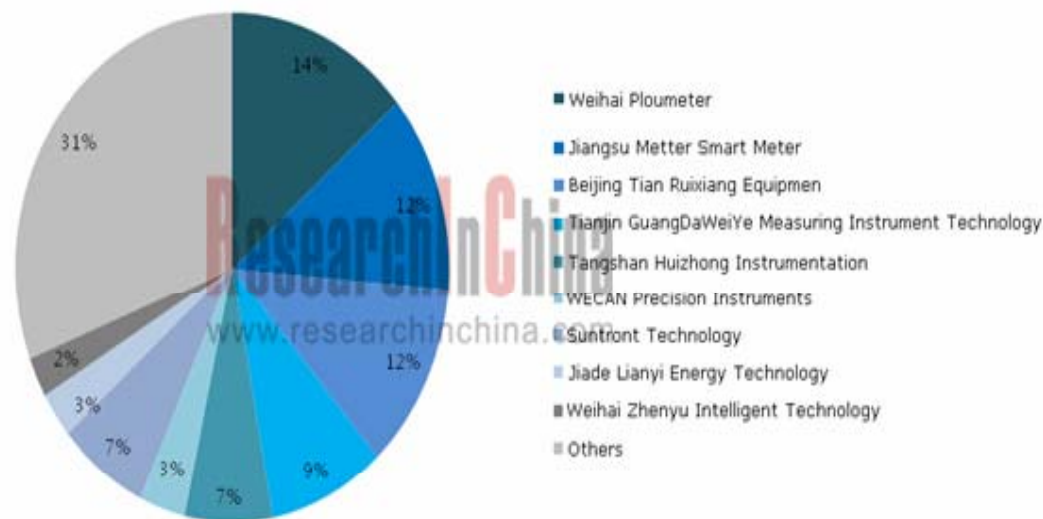
By product, China-made products dominate the current market with the share of 80%. With the growth in installation and application of heat meters in China, the long-term reliable operation of heat meters has drawn the attention and concern of users.

In order to ensure the long service life of heat meters, durability tests are inevitable in accordance with relevant provisions. The EN1434-2007 standard (2400-hour durability tests) has been implemented in Europe since 2007, while the current standard in China only requires 300-hour durability tests. Therefore, Heat Meter Working Committee of China Metrology Association has conducted two durability tests of 2400 +300 hours from 2013, with the pass rate of nearly 90%, which provides a reliable evidence for the promotion and application of heat meters made in China.

The report highlights the following:

- Policies, industrial characteristics, development pattern, development history and the like of China heat meter industry;
- Status quo of domestic and foreign heating and heat metering;
- China's heat meter market size (installation area, installed capacity, sales volume), competition patterns of enterprises and products, durability tests;
- Operation, heat meter business and so forth of 9 foreign and 23 Chinese heat meter manufacturers.

### Market Share of Major Heat Meter Enterprises in China, 2015



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##### 1.1.1 Definition

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