

# China Heat Meter Industry Report, 2017-2021

Oct. 2017

## **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 Chinese urban heating market has grown steadily in recent years, reaching RMB161.1 billion in 2016, a CAGR of 9.9% between 2011 and 2016, higher than the world's average (3.5%), and expected to rise to RMB166.2 billion in 2017 and surpass RMB180 billion in 2021.

Urban heating is primarily concentrated in northern China. By 2016, the urban heat-supply area in the region amounted to 7.39 billion square meters, up 9.9% from a year ago, including 5.45 billion square meters of urban residential buildings, representing 73.7% of the total. Despite an urban heat-supply area of over 7 billion square meters in northern China, the heating area that is metered and charged holds a small proportion (only 18.1% in 2016). Therefore, the Chinese heat metering market still shows huge potential demand.

China's reform of heat metering has driven the development of heat meter industry. By the end of 2016, a total of about 37.64 million heat meters were installed in heating areas in northern China, up 18.3% over the previous year, and among them 5.81 million heat meters were new ones including 3.71 million pieces for new buildings and 2.10 million pieces for the buildings that were renovated.

The country has introduced a series of policies to advance the reform of heat metering in northern China in recent years. The Ministry of Housing and Urban-Rural Development and the National Development and Reform Commission jointly issued the National Plan for Planning and Construction of Urban Infrastructure during the 13th Five-Year Plan Period in May 2017, proposing to vigorously promote household-based residential heat-supply metering in heating areas, making it a must for all new residential buildings, and demanding renovation of existing residential buildings for such a practice. Driven by the policy, a total of 67.50 million heat meters are expected to be installed in heat-supply regions in northern China by 2021, keeping an AAGR of over 10% during 2017-2021.

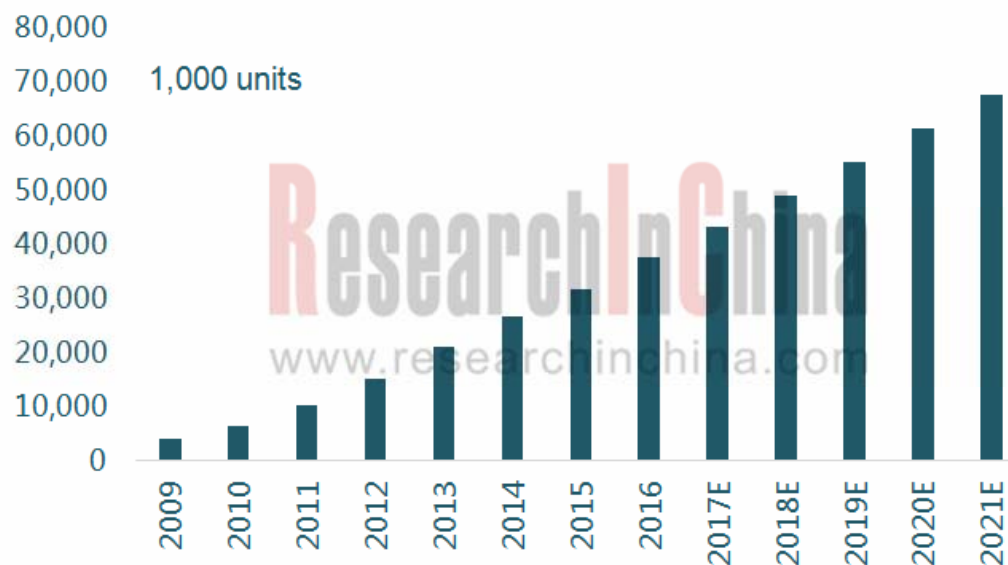
There are more than 200 heat meter producers in China, mostly small and less competitive. The market is dominated primarily by companies including Weihai Ploumeter, Jiangsu Metter Smart Meter, Huizhong Instrumentation and Suntront Technology with CR5 hitting 54.8% in 2016, a relatively high industry concentration. Weihai Ploumeter is the largest heat meter manufacturer in China with heat meter capacity of 1.5 million pcs/a and in 2016 a market share of 16.3%.

Ultrasonic heat meter prevails in the Chinese market with a market share of over 80%, largely because of its greater suitability for China's heat-supply conditions given the country's poorer heating infrastructure compared with developed countries.

China Heat Meter Industry Report, 2017-2021 highlights the followings:

- ◆ Overview of heat meter (definition, classification, composition, industry chain, etc.);
- ◆ Policies, characteristics, business model, development history and the like of the heat meter industry in China;
- ◆ Chinese urban heating market size, urban heat-supply area, heat meter installations, competitive landscape, development prospects, problems. etc.;
- ◆ Nine foreign and twenty-four Chinese heat meter manufacturers (operation, heat meter business, etc.)

## Heat Meter Installations in Northern China, 2009-2021E



Source: China Heat Meter Industry Report, 2017-2021

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