

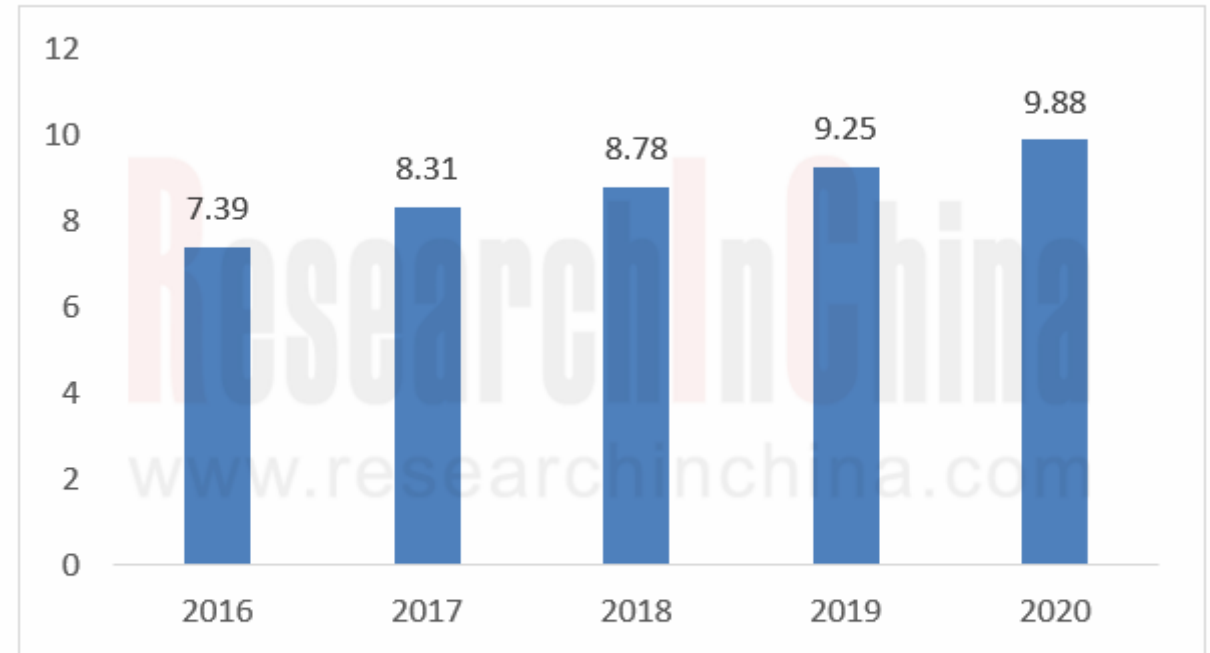
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# Global and China Heat Meters Industry Report, 2022-2027

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A heat meter is an instrument used to measure, calculate and display the value of heat released or absorbed by water flowing through a heat exchange system, and is mainly used for measuring the heating heat consumption of residential and public buildings. Over the years, China has issued a number of policies to promote the implementation and transformation of household heating metering: in 2006, China started to implement mandatory meter installation and promulgated the "Energy Conservation Law of the People 's Republic of China" in the following year, which set the goal of heating system reform from the legal system. In 2017, ten ministries including the National Development and Reform Commission promulgated "Winter Clean Heating Plan for Northern Regions (2017-2021) ", which new residential buildings are required to install all heating sub-metering and temperature control devices when supporting the construction of heating facilities. In September 2020, China officially released carbon neutrality and carbon emission peak target, and the heating industry is expected to continue to promote energy conservation and emission reduction, save heat consumption through intelligent equipment, and use information-based systems to achieve efficient dispatch of heat.

### Urban Heating Area in China, 2016-2020

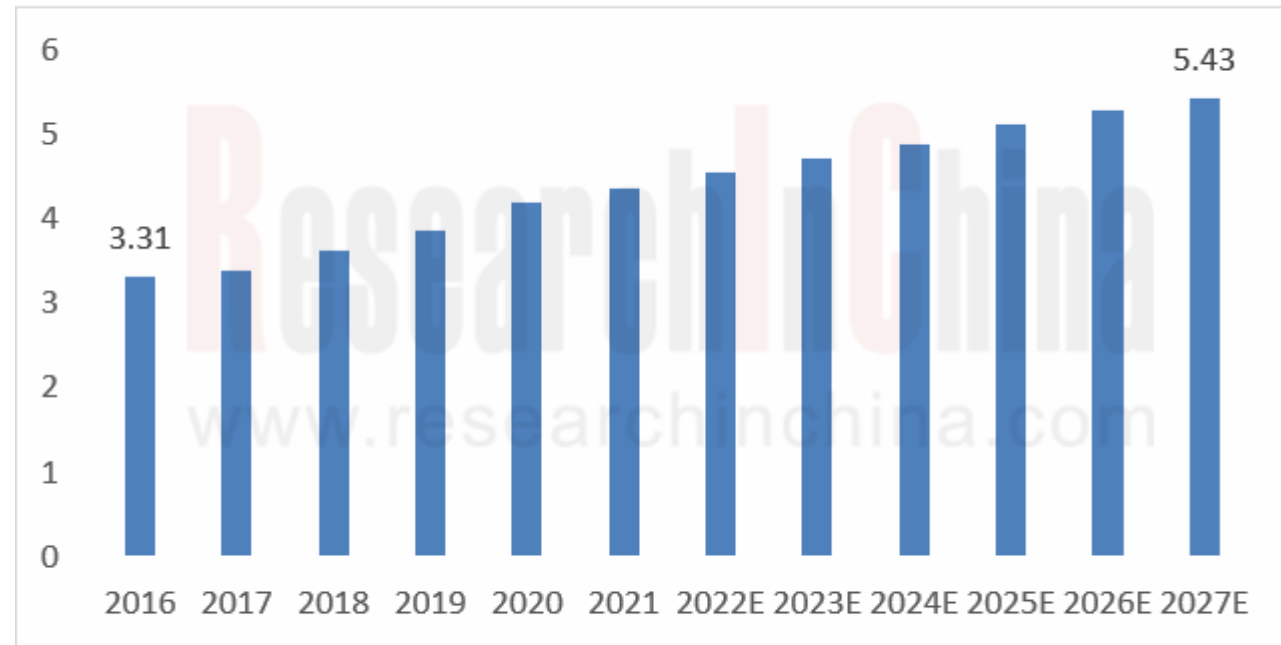


(Unit: Billion m<sup>2</sup>)

Source: ResearchInChina

With the growth of domestic heating area, the domestic market demand for heat meters is also growing. The number of heat meters sold in China has increased from 3.31 million in 2016 to 4.36 million in 2021, with CAGR of 5.7%. With the entry of emerging things such as AI, NB-IOT and the Internet of Things, the heat meter industry will continue to maintain a good development trend. It is expected that the shipments of heat meters in China will reach 5.43 million units in 2027, growing at CAGR of 3.7% from 2021.

## Heat Meter Market Size in China, 2017-2027E



(Unit: Million sets)

Source: ResearchInChina

# Heat Meter Competition Landscape

In terms of competition landscape, the heat meter industry is generally less concentrated, and domestic manufacturers have a high degree of fit with the needs of downstream heating supply and heating consuming companies in terms of product design, occupying a larger dominant position, among which Ploumeter, Runa Smart Equipment, Huizhong Instrumentation and other companies occupy a higher market share.

Weihai Ploumeter Co., Ltd. (referred to as "Ploumeter") was established in 1988 with stock code: 832651. It is mainly engaged in the research and development and production of IOT ultrasonic measuring meters, and provides overall solutions for heating energy saving and smart water affairs based on measurement data. The main products include ultrasonic heat meters and systems, ultrasonic water meters and flow meters, etc. In 2021, its revenue reached 233 million yuan, and the revenue from heat meters accounted for 79%.

Runa Smart Equipment Co., Ltd. (referred to as "Runa Smart Equipment") was established in 2008, stock code: 301129, specializing in the research & development and production of heating energy-saving products, the design and implementation of heating energy-saving solutions, and can provide heat customers with a complete industry chain service covering "energy metering and data collection, energy intelligent control, data interaction and analysis management, and energy-saving services", and is a smart heating supply overall solution provider integrating "product + solution + service". In 2021, its revenue reached 530 million yuan, of which 13.7% was contributed by heat meter.

Huizhong Instrumentation Co., Ltd. (referred to as "Huizhong Instrumentation") was established in 1994, stock code: 300371, dedicated to the research of ultrasonic flow measurement technology and the research and development and production of ultrasonic flow measurement products. The main products include ultrasonic heat meters, ultrasonic water meters, ultrasonic flow meters and related smart management systems. In 2021, the revenue reached 524 million yuan, heat meters contributed 27.5% of the total.

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## Beijing Headquarters

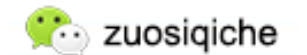
TEL: 010-82601561, 82863481

Mobile: 13718845418

Email: [report@researchinchina.com](mailto:report@researchinchina.com)

Website:  
[www.researchinchina.com](http://www.researchinchina.com)

WeChat: [zuosiqiche](https://www.wechat.com/p/zuosiqiche)



## Chengdu Branch

TEL: 028-68738514

FAX: 028-86930659