

China Waste Heat Utilization Equipment Industry Report, 2013-2015

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Abstracts

China has rich waste heat resources. Especially in steel, nonferrous, chemical, cement, building materials, oil & petrochemical, light industry, coal and other sectors, waste heat resources approximately occupy 17%-67% of the total fuel consumption, of which, recyclable waste heat resource roughly stand up 60% of the total waste heat resources. At present, China's waste heat utilization ratio is rather low, with the figure in large steel enterprises being 30%-50%. But the waste heat utilization in other sectors is even lower. Thus, China is expected to see a huge potential to improve its waste heat utilization.

By temperature of waste heat, the waste heat utilization equipments fall into two categories: the first comes to waste heat bolier which uses medium-and high-temperature waste heat; the second refers to lithium bromide refrigerator (heat pump) and screw expander, both of which use low-temperature waste heat. Of these, waste heat boiler occupies a lion's share in waste heat utilization equipments. In 2012, the output of waste heat boiler approximated 812 sets, totaling 39,788 steam tons.

According to the 12th Five-Year Plan On Energy Conservation And Emission Reduction by the State Council, China will increase its capacity of waste heat/pressure power generation by 20 million KW as of 2015, expecting to save 57 million tons of coal equivalents. The release of the planning injects new development motives for the waste heat utilization field, leading to the development of low-temperature waste heat utilization equipments represented by lithium bromide refrigerators and screw expanders.

When it comes to lithium bromide absorption device, Chinese market capacity reached RMB3.32 billion in 2012, with leading industrial players including Yantai EBARA, the



market occupancy of which realizes 27%, far above Shuangliang Group and Henan Yuanda Boiler.

The screw expander industry is at a stage for promotion in China and beyond, with major domestic industrial players including Jiangxi Huadian Electric Power, Kaishan and Shanghai Hanbell Precise Machinery. In particular, Jiangxi Huadian Electric Power was the first involved in the production of screw expanders. And its first screw expander was put into use in 2002. Thus far, its screw expanders' power range from 50KW to 1,500KW, and the application in fields like electricity, steel, smelting, petrochemical and light industry has exceeded 60 sets.

The report highlights the followings:

Overview of China waste heat utilization equipment industry, including development history, polices and regulations, market scale, status quo and development outlook;

China waste heat utilization equipment market segments, including market size, competition pattern and development tendency;

10 industrial players such as Suzhou Hailu Heavy Industry, Hangzhou Boiler Group, Yantai EBARA, Shuangliang Group, Jiangxi Huadian Electric Power, Kaishan, Shanghai Hanbell Precise Machinery in terms of profile, fiscal data, capacity distribution, product strength and latest development strategy.



Contents

1. BRIEF INTRODUCTION TO WASTE HEAT UTILIZATION INDUSTRY

- 1.1 Sources and Application of Waste Heat Resources
 - 1.1.1 Sources of Waste Heat Resources and Distribution
 - 1.1.2 Application of Waste Heat Resources
- 1.2 Definition and Classification of Waste Heat Utilization Equipment
- 1.3 Assessment on Economic Benefit of Waste Heat Utilization Equipment

2. OPERATING ENVIRONMENT OF WASTE HEAT UTILIZATION EQUIPMENTS

- 2.1 Sound Macro-Economic Development
- 2.2 Huge Potential
- 2.3 Policy Support

3. WASTE HEAT BOILER DEVELOPMENT

- 3.1 Market Features
- 3.2 Market Scale
- 3.3 Competition Pattern
- 3.4 Cogeneration Calculation of Major Related Industries
 - 3.4.1 Steel Industry
 - 3.4.2 Coking Industry
 - 3.4.3 Cement Industry

4. DEVELOPMENT OF LITHIUM BROMIDE REFRIGERATOR (HEAT PUMP) INDUSTRY

- 4.1 Status Quo
- 4.2 Market Scale
- 4.3 Competition Pattern
- 4.4 Development Prospect

5. DEVELOPMENT OF SCREW EXPANDER INDUSTRY

- 5.1 Status Quo
- 5.2 Economic Benefits
- 5.3 Competition Pattern



6. KEY WASTE HEAT UTILIZATION EQUIPMENT COMPANIES

- 6.1 Suzhou Hailu Heavy Industry
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Main Business
 - 6.1.4 Gross Margin
 - 6.1.5 R&D Expenditure
 - 6.1.6 Clients & Suppliers
 - 6.1.7 Business Strategy
- 6.2 Hangzhou Boiler Group
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Main Business
 - 6.2.4 Gross Margin
 - 6.2.5 Orders
 - 6.2.6 Clients & Suppliers
 - 6.2.7 Development Edge
- 6.3 Shuangliang Group
 - 6.3.1 Profile
 - 6.3.2 Operation
 - 6.3.3 Main Business
 - 6.3.4 Gross Margin
 - 6.3.5 Main Products
 - 6.3.6 Clients & Suppliers
 - 6.3.7 Development Edge
- 6.4 Jiangsu Taihu Boiler
 - 6.4.1 Profile
 - 6.4.2 Main Products
 - 6.4.3 Development Edge
- 6.5 Sichuan Crun
 - 6.5.1 Profile
 - 6.5.2 Operation
 - 6.5.3 Main Business
 - 6.5.4 Main Products
 - 6.5.5 Gross Margin
 - 6.5.6 Clients & Suppliers
 - 6.5.7 R&D Expenditure



6.5.8 Development Edge & Strategies

- 6.6 Wuxi Huaguang Boiler
 - 6.6.1 Profile
 - 6.6.2 Operation
 - 6.6.3 Main Business
 - 6.6.4 Main Products
 - 6.6.5 Output & Sales and Orders
 - 6.6.6 Gross Margin
 - 6.6.7 Development Strategy
- 6.7 Zhejiang Kaishan Compressor
 - 6.7.1 Profile
 - 6.7.2 Operation
 - 6.7.3 Main Business
 - 6.7.4 Main Products
 - 6.7.5 Gross Margin
 - 6.7.6 Cost Analysis
 - 6.7.7 R&D Expenditure
 - 6.7.8 Clients & Suppliers
 - 6.7.9 Development in 2012-2013
- 6.8 EBARA
 - 6.8.1 Profile
 - 6.8.2 Operation
 - 6.8.3 Yantai EBARA
 - 6.8.4 Main Products
 - 6.8.5 Development Edge
- 6.9 Shanghai Hanbell Precise Machinery
 - 6.9.1 Profile
 - 6.9.2 Operation
 - 6.9.3 Main Business
 - 6.9.4 Gross Margin
 - 6.9.5 R&D Expenditure
 - 6.9.6 Cost Analysis
 - 6.9.7 Clients & Suppliers
 - 6.9.8 Main Products
- 6.10 Jiangxi Huadian Electric Power
 - 6.10.1 Profile
 - 6.10.2 Main Products
 - 6.10.3 Major Application Projects



Selected Charts

SELECTED CHARTS

Distribution of Waste Heat Resources

Features of Waste Heat Resources

Recycle of Waste Heat Resources' Classified Utilization and Thermal Power Conversion Efficiency

Classification, Characteristics and Application of Waste Heat Utilization Equipments Organic Working Medium Bicirculating Screw Expander Power Generation System Budget of Return on Investment in Heat Waste Power Generation in the Cement Industry

YoY Growth Rate of China's GDP, 1999-2013

YoY Growth Rate for Industrial Added Value of Chinese Enterprises Above Designated Scale, 2007-2013

YOY Growth Rate of Fixed Asset Investments, 2000-2013

Penetration Rate of Waste Heat Power Generation in High Energy-Consuming Industries and Future Development Target

Policies and Contents Regarding Waste Heat Reclamation and Utilization, 2010-Aug.2013

Output of Waste Heat Boilers in China and Output Change, 2007-2012 (set)

Output of Waste Heat Boilers in China and Output Change, 2007-2012 (steam tons)

Output of Waste Heat Boilers in China and Output Change, 2011-2015E (sets, steam tons)

Market Pattern of Waste Heat Boilers in China, 2011 (set)

Market Pattern of Waste Heat Boilers in China, 2011 (steam tons)

Output of Waste Heat Boilers of All Varieties and Major Manufacturers in China, 2011 Sintering Machine Cogeneration, 2010 vs.2015E

BF Ironmaking Top Pressure Power Generation, 2010 vs.2015E

Coal Gas Optimal Utilization Power Generation, 2010 vs.2015E

Dry Quenching Waste Heat Power Generation, 2010 vs.2015E

Waste Heat Installed Power Generation Capacity in China Cement Industry, 12th Five-Year Plan Period (2011-2015E)

China Lithium Bromide Market Capacity & Change, 2008-2012

China Lithium Bromide Market Capacity & Change, 2011-2015

Market Share of Major Lithium Bromide Refrigerator Manufacturers in China, 2010-2013

Key Drives to the Promotion of Screw Expanders

Major Screw Expander Manufacturers in China

Revenue and Net Income of Suzhou Hailu Heavy Industry, 2008-2013



Revenue and Net Income Forecast of Suzhou Hailu Heavy Industry, 2012-2016E

Operating Revenue of Suzhou Hailu Heavy Industry by Product, 2012

Revenue Structure of Suzhou Hailu Heavy Industry by Region, 2012

Gross Margin of Suzhou Hailu Heavy Industry by Product, 2008-2013

Main Waste Heat Boilers of Suzhou Hailu Heavy Industry

R&D Expenditure of Suzhou Hailu Heavy Industry, 2011-2012

Suzhou Hailu Heavy Industry's Revenue from Top 5 Clients and % of Total Revenue, 2010-2012

Suzhou Hailu Heavy Industry's Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012

Operating Revenue and Profit of Hangzhou Boiler Group, 2008-2013

Revenue and Net Income of Hangzhou Boiler Group, 2012-2016E

Revenue Structure of Hangzhou Boiler Group by Product, 2012

Revenue Structure of Hangzhou Boiler Group by Region, 2012

Gross Margin of Hangzhou Boiler Group by Product, 2008-2013

Main Waste Heat BoilerS of Hangzhou Boiler Group

Backlog Orders of Hangzhou Boiler Group, End-2012

Hangzhou Boiler Group's Revenue from Top 5 Clients and % of Total Revenue, 2010-2012

Hangzhou Boiler Group's Revenue from Top 5 Clients and % of Total Revenue, 2012

Hangzhou Boiler Group's Procurement from Top 5 Suppliers and % of Total

Procurement, 2010-2012

Hangzhou Boiler Group's Procurement from Top 5 Suppliers and % of Total

Procurement, 2012

Revenue and Net Income of Shuangliang Group, 2008-2012

Revenue and Net Income of Shuangliang Group, 2012-2016E

Operating Revenue Structure of Shuangliang Group by Product, 2012

Revenue Structure of Shuangliang Group by Region, 2012

Gross Margin of Shuangliang Group by Product, 2008-2013

Main Waste Heat Boilers of Shuangliang Group

Main Absorption Heat Pumps of Shuangliang Group

Shuangliang Group s' Revenue from Top 5 Clients and % of Total Revenue,

2010-2012

Shuangliang Group' Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012

Main Waste Heat Boilers of Taihu Boiler

Revenue and Profit of Sichuan Crun, 2008-2013

Revenue and Net Income of Sichuan Crun, 2012-2016E

Operating Revenue Structure of Sichuan Crun by Product, 2012



Primary Business Structure of Sichuan Crun by Region, 2012

Output and Sales Volume of Major Products of Sichuan Crun, 2011-2012

Main Waste Heat Boilers of Sichuan Crun

Gross Margin of Sichuan Crun by Product, 2008-2013

Sichuan Crun's Revenue from Top 5 Clients and % of Total Revenue, 2010-2012

Sichuan Crun's Revenue from Top 5 Clients and % of Total Revenue, 2012

Sichuan Crun's Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012

Sichuan Crun's Procurement from Top 5 Suppliers and % of Total Procurement, 2012

R&D Expenditure of Sichuan Crun, 2011-2012

Revenue and Net Income of Wuxi Huaguang Boiler, 2008-2013

Revenue and Net Income of Wuxi Huaguang Bolier, 2012-2016E

Revenue Breakdown of Wuxi Huaguang Boiler by Product, 2012

Revenue Breakdown of Wuxi Huaguang Boiler by Region, 2012

Main Waste Heat Boiler Projects of Wuxi Huaguang Boiler

Orders of Wuxi Huaguang Boiler, 2012

Gross Margin of Wuxi Huaguang Boiler by Product, 2008-2013

Revenue and Net Income of Kaishan, 2009-2013

Revenue and Net Income of Kaishan, 2011-2016E

Operating Revenue Structure of Kaishan by Product, 2012

Operating Revenue Structure of Kaishan by Region, 2012

Standard Model of ORC Screw Expander Power Station for Kaishan (50 Hertz)

Gross Margin of Kaishan by Product, 2008-2013

Cost Structure of Kaishan, 2011-2012

R&D Expenditure of Kaishan, 2010-2012

Kaishan's Revenue from Top 5 Clients and % of Total Revenue, 2010-2012

Kaishan's Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012

Revenue and Net Income of EBARA, FY2010-FY2014

Operating Revenue Structure of Ebara by Product, FY2013

Operating Revenue Structure of Ebara by Region, FY2013

Major Heat Pumps of Yantai Ebara

Revenue and Net Income of Hanbell, 2009-2013

Revenue and Net Income of Hanbell, 2011-2016E

Operating Revenue Structure of Hanbell by Product, 2012

Operating Revenue Structure of Hanbell by Region, 2012

Gross Margin of Shanghai Hanbell Precise Machinery by Product, 2008-2013

R&D Expenditure of Shanghai Hanbell Precise Machinery, 2010-2012

Cost Structure of Shanghai Hanbell Precise Machinery, 2011-2012

Hanbell's Revenue from Top 5 Clients and % of Total Revenue, 2010-2012



Hanbell's Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012 Screw Expander Engines Made by Jiangxi Huadian Electric Power Main Product Series of Jiangxi Huadian Electric Power Project Cases of Jiangxi Huadian Electric Power



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