

China Heating Radiator Industry Report, 2009-2010

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Abstracts

Heating radiator is a terminal device transferring heat from heat media into rooms. Driven by old housing system improvement, heating zone southward expansion and rural urbanization, China's heating area has increased year-by-year, promoting the market demand for heating radiators from 360 million units in 2006 to 460 million units in 2009, with CAGR reaching 8.5%.

In 2010, China will implement urban residential heating system measured by household all over the country, and complete the heating measurement and energy-efficiency improvement of current 58 million square meters of housing area in the north, which will greatly push the development of heating radiator market, and it is expected that China's heating radiator market demand will boost up to 470 million units in 2010. In addition, China will build another six million suites of low-rent apartments and six million suites of affordable apartments, and complete the alteration of over two million shanties in forestlands, farms and mines in the following three years, which will exert huge influence on the heating radiator industry, and it is expected that China's heating radiator market demand will reach 510 million units in 2012.

Starting with China's heating radiator development environment, the report analyzes the supply and demand, and underlines five heating radiator products and six regional markets.

Heating radiator can be categorized into pig iron radiator, steel radiator, aluminum radiator, copper radiator and composite radiator in terms of materials. Before the year of 2006, pig iron radiator had dominated China's heating radiator market, accounting for around 60%, and followed by steel radiator, covering 20%. With consumers' increasing requirements on high efficiency, energy conservation, aesthetics and environmental protection, steel radiator with such advantages had become popular, and its market share rapidly rose to 30% in 2008, while pig iron radiator's declined to 50%. It is



forecasted that the market shares of pig iron radiator and steel radiator will respectively reach 40% and 35% in 2010.

Heating radiator is mainly used for urban heating, and the climate is quite different in the north and south of China, so the heating radiator consumption market of China has distinct regional characteristics, mainly concentrating on North China, Northeast and Northwest. Steel and aluminum alloy radiators dominate in North China, accounting for around 55%, aluminum alloy and pig iron radiators in Northeast, covering around 80%; and pig iron radiators in Northwest, accounting for 48%. Relatively, the heating radiator producing areas are equally distributed in China, only comparatively concentrated in North China, Northeast and East China, respectively accounting for 29%, 25% and 18% of the total number of enterprises in 2009.

In the meantime, the report sheds light on 28 key companies such as Beijing Sayeah, Beijing Pioneer, Hebei Shengchun, Lanzhou Longxing, Yingkou Panpan and Nuoro China, as well as the investment opportunities and risks in the industry.



Contents

1. CHINA'S HEATING RADIATOR INDUSTRY POLICY ENVIRONMENT

- 1.1 Industry Policy
- 1.2 Relevant Policies

2. CHINA'S HEATING RADIATOR INDUSTRY DEVELOPMENT STATUS QUO

- 2.1 Operation
- 2.2 Market Supply & Demand
 - 2.2.1 Production
 - 2.2.2 Demand
- 2.3 Competition
 - 2.3.1 Industry Concentration Ratio
 - 2.3.2 Brand Competition
 - 2.3.3 Region Competition
 - 2.3.4 Product Competition

3. CHINA'S HEATING RADIATOR INDUSTRY BY REGION

- 3.1 East China
 - 3.1.1 Production & Sales
 - 3.1.2 Company Competition
 - 3.1.3 Development Prospect
- 3.2 North China
 - 3.2.1 Production & Sales
 - 3.2.2 Company Competition
 - 3.2.3 Development Prospect
- 3.3 Northeast
 - 3.3.1 Production & Sales
 - 3.3.2 Company Competition
 - 3.3.3 Development Prospect
- 3.4 Central South
 - 3.4.1 Production & Sales
 - 3.4.2 Company Competition
 - 3.4.3 Development Prospect
- 3.5 Northwest
- 3.5.1 Production & Sales



- 3.5.2 Company Competition
- 3.5.3 Development Prospect
- 3.6 Southwest
 - 3.6.1 Production & Sales
 - 3.6.2 Company Competition
 - 3.6.3 Development Trend

4. KEY PRODUCTS

- 4.1 Pig Iron Heating Radiator
 - 4.1.1 Market Status Quo
 - 4.1.2 Key Companies
 - 4.1.3 Development Trend
- 4.2 Aluminum Heating Radiator
 - 4.2.1 Market Status Quo
 - 4.2.2 Key Companies
 - 4.2.3 Development Trend
- 4.3 Copper Heating Radiator
 - 4.3.1 Competition Status Quo
 - 4.3.2 Development Trend
- 4.4 Steel Heating Radiator
 - 4.4.1 Market Status Quo
 - 4.4.2 Development Trend
- 4.5 Composite Radiator
 - 4.5.1 Market Status Quo
 - 4.5.2 Development Trend

5. KEY COMPANIES

- 5.1 Beijing Sayeah Radiators Factory
 - 5.1.1 Company Profile
 - 5.1.2 Operation
- 5.2 Zehnder (China) Indoor Climate Co., Ltd
 - 5.2.1 Company Profile
 - 5.2.2 Operation
- 5.3 Beijing Florece Radiator Co., Ltd
 - 5.3.1 Company Profile
 - 5.3.2 Operation
 - 5.3.3 Technology Advantages



- 5.4 Beijing Pioneer Radiator Co., Ltd
 - 5.4.1 Company Profile
 - 5.4.2 Operation
- 5.5 IRSAP Golden Tiger Radiators (Beijing) Co., Ltd
 - 5.5.1 Company Profile
 - 5.5.2 Operation
 - 5.5.3 Product Advantages
- 5.6 Tianjin Huachen Radiator Co., Ltd
 - 5.6.1 Company Profile
 - 5.6.2 Operation
- 5.7 Yingkou Panpan Radiators Manufacturing Co., Ltd
 - 5.7.1 Company Profile
 - 5.7.2 Operation
- 5.8 Yingkou Xinfa Non-ferrous Metal Products Manufacturing Co., Ltd
 - 5.8.1 Company Profile
 - 5.8.2 Operation
- 5.9 Shenyang Futian Heating & Venting Manufacture Co., Ltd
 - 5.9.1 Company Profile
 - 5.9.2 Operation
- 5.10 Nuoro (China) Co., Ltd
 - 5.10.1 Company Profile
 - 5.10.2 Operation
- 5.11 Changchun Yingjun Xiangfeng Radiators Technology Co., Ltd
 - 5.11.1 Company Profile
 - 5.11.2 Operation
- 5.12 Dalian Haixin Radiator Manufacture Co., Ltd
 - 5.12.1 Company Profile
 - 5.12.2 Operation
- 5.13 Shandong Bantai Radiator Co., Ltd
 - 5.13.1 Company Profile
 - 5.13.2 Operation
- 5.14 Shandong Shuangguan Radiators Co., Ltd
 - 5.14.1 Company Profile
 - 5.14.2 Operation
- 5.15 Others
 - 5.15.1 Rettig Heating (Tianjin) Co., Ltd
 - 5.15.2 Tianjin MSH Kanghua Stainless Steel Goods Co., Ltd
 - 5.15.3 Tianjin Rising Radiators Co., Ltd
 - 5.15.4 Tianjin Jinri Radiators Co., Ltd



- 5.15.5 Hebei Shengchun Jinuan Radiators Co., Ltd
- 5.15.6 Datong Radiators Co., Ltd
- 5.15.7 Shanxi Qingxu Beilushu Enterprise Group Co, Ltd
- 5.15.8 Lanzhou Longxing Radiator Co., Ltd
- 5.15.9 Henan Shenqiu Hengchun Heating & Ventilating Equipment Co., Ltd
- 5.15.10 Shenyang Jishui Course Radiator Co., Ltd
- 5.15.11 Anshan Time Spring Radiators Co., Ltd
- 5.15.12 Shandong Metallurgy Radiator Factory
- 5.15.13 Qingdao Hotide Company
- 5.15.14 Xinxiang Xinfei Radiator Co., Ltd

6. CHINA'S HEATING RADIATOR INDUSTRY DEVELOPMENT TREND

- 6.1 Market
- 6.2 Products



Selected Charts

SELECTED CHARTS

Total Output Value of China's Heating Radiator Industry, 2006-2009

Main Business Revenue and Total Profit of China's Heating Radiator Industry, 2008-2009

Operating Profit Margin of China's Heating Radiator Industry, 2008-2009

China's Heating Radiator Output, 2006-2009

China's Heating Radiator Market Demand, 2006-2009

China's Heating Radiator Industry Concentration Rate, 2009

China's Top Ten Heating Radiator Brands, 2009

China's Heating Radiator Distribution by Region, 2009

China's Heating Radiator Market Share by Product, 2006-2010

Heating Radiator Product Consumption Structure in East China

Heating Radiator Company Distribution in East China, 2009

Heating Radiator Product Consumption Structure in North China

Heating Radiator Company Distribution in North China, 2009

Heating Radiator Product Consumption Structure in Northeast

Heating Radiator Company Distribution in Northeast, 2009

Heating Radiator Product Consumption Structure in Central South

Heating Radiator Company Distribution in Central South, 2009

Heating Radiator Consumption Structure in Northwest, 2009

Heating Radiator Company Distribution in Northwest, 2009

Heating Radiator Company Distribution in Southwest, 2009

Advantages & Disadvantages of Pig Iron Radiator

China's Key Pig Iron Radiator Companies and Output Capacities

Advantages & Disadvantages of Aluminum Radiator

Main Development Stages of China Aluminum Radiator Market

China's Key Aluminum Radiator Companies and Output Capacities

Advantages & Disadvantages of Steel Radiator

Sales Network of Beijing Sayeah Radiators

Main Radiator Products of Beijing Sayeah Radiators

Main Radiator Products of Zehnder (China) Indoor Climate

Main Operating Indices of Zehnder (China) Indoor Climate, 2007-2008

Main Operating Indices of Beijing Florece Radiator, 2004-2008

Main Operating Indices of IRSAP Golden Tiger Radiators, 2007-2008

Main Operating Indices of Tianjin Huachen Radiators, 2004-2008

Main Operating Indices of Yingkou Panpan Radiators Manufacturing, 2004-2008



Main Operating Indices of Yingkou Xinfa Non-ferrous Metal Products Manufacturing, 2007-2008

Operating Income & Profit of Futian Heating & Venting Manufacture, 2006-2008

Main Operating Indices of Nuoro China, 2007-2008

Main Operating Indices of Xiangfeng Radiators, 2007-2008

Main Operating Indices of Dalian Haixin Radiators, 2006-2008

Main Operating Indices of Shandong Bantai Radiator, 2004-2008

Main Operating Indices of Shandong Shuangquan Radiators, 2006-2008

Main Radiator Products of Rettig Heating (Tianjin)

China's Heating Radiator Market Demand, 2010-2013



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