

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.

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