

Research Report on China's Boiler Industry, 2022-2030

<https://marketpublishers.com/r/R3583657B03EN.html>

Date: November 2021

Pages: 50

Price: US\$ 2,800.00 (Single User License)

ID: R3583657B03EN

Abstracts

Boilers play an important role in China's economy and the Chinese people's lives. The boiler is one of the major equipment of thermal power generation. By the end of 2020, the installed thermal power capacity in China was 1.24517 billion kilowatts, an increase of 4.7% YOY, accounting for 56.58% of the total installed capacity of electricity in China.

According to CRI's analysis, by the end of 2020, there were more than 300 boiler manufacturers in China, and the average annual production volume was less than 2,000 evaporation tons. China's boiler industry is troubled by low market concentration ratio, outdated technologies and low gross profit margins.

China-made boilers are dominated by industrial boilers. In industrial production, industrial boilers are essential thermal power equipment. They are classified into coal-fired steam boilers, oil and gas-fired steam boilers, thermal oil furnaces, and hot-blast stoves, and are applied in power generation, industrial production, light industry, textiles, metallurgy, etc. From 2010 to 2020, China's industrial boiler production fluctuated, increasing from 336,382 evaporation tons in 2010 to 512,736 evaporation tons in 2013, dropping back to 322,293 evaporation tons in 2018, and then increasing to 439,112 evaporation tons in 2020, with a CAGR of about 2.7% from 2010 to 2020.

As coal-fired boilers cost much less than natural gas boilers, they dominate China's industrial boiler market. For a long time to come, they will continue to be the mainstream of industrial boilers in China, and most of them will be medium and heavy-duty ones. Coal-fired boilers cause serious environmental pollution. As the energy supply structure changes and energy conservation and environmental protection requirements become more stringent, small coal-fired industrial boilers will be phased out, and the high-efficiency, energy-saving and low-pollution industrial boilers that use clean fuels and

clean combustion technologies will become a development trend.

As China's environmental protection policies have become stricter in recent years, the Chinese government is promoting the transformation and upgrade of industrial boiler manufacturers. In Jul. 2016, China's Ministry of Industry and Information Technology issued The Plan for Industrial Application of Energy Efficient and Environmentally Friendly Industrial Boilers to transform and upgrade the industrial boiler industry, save energy, reduce emissions and improve the environment. The Plan required that by the end of 2020, some production bases of energy efficient and environmentally friendly industrial boilers should have been built, and energy efficient and environmentally friendly industrial boilers should take up a market share of more than 60% with a production volume of 1 million evaporation tons. The Opinions on the Ecological and Environmental Protection to Win the Fight in Pollution Prevention and Control clearly put forward to vigorously promote the management of bulk coal and reduction in coal consumption by adopting other alternatives. The Opinions required that by 2020, coal-fired boilers below 35 evaporation tons per hour should be phased out in key areas; clean and efficient coal-fired boilers should be promoted.

As the Chinese government strengthens the ecological protection and management, many industrial boiler manufacturers are upgrading their boilers, to meet the standards of energy conservation and environmental protection.

According to CRI, it is expected that coal-fired industrial boilers will remain the dominant product of industrial boilers for a considerable period of time in the future. However, as it will cause serious pollution to the environment, with the continuous change of energy supply structure and the increasingly strict requirements of energy conservation and environmental protection, natural gas development and application will also enter a high-speed development stage. Therefore, high-efficiency, energy-saving and low-pollution industrial boilers using clean fuel and related technologies will be the development trend.

Many local governments of China have also taken measures to control the pollutant discharge of industrial enterprises. Replacing coal-fired boilers with natural gas boilers or electric boilers has become a hot trend. In cities that have the pipelines for the West-East Gas Transmission Project and natural gas import and port cities able to import liquefied gas and their surrounding areas, gas-fired boilers have huge growth potential.

Supported and encouraged by the Chinese government, the gas-fired boiler industry will have a bright prospect. Environmentally friendly gas-fired boilers will certainly replace

coal-fired boilers to become the mainstream products on China's boiler market.

Topics covered:

Economic and policy environment of China's boiler industry

Status of production of and demand for boilers in China, 2016-2021

Analysis on major boiler enterprises in China

Major driving forces and market opportunities for China's boilers

Forecast on major driving forces, challenges and opportunities for China's boilers, 2022-2030

Major participants in China's boiler market and their competitive benchmark

Forecast on the revenue of China's boiler market, 2022-2030

Strategies adopted by major participants in the market to increase their market share in the industry

Forecast on the segment to dominate the boiler market by 2030

Competitive advantages of the major participants in the boiler market

Impact of COVID-19 on China's boilers

Major restrictions over the growth of China's boilers

Process of gas-fired boilers replacing coal-fired boilers

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Prospect of China's boiler industry

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