

Research Report on Chinese Home Appliance Manufacturing Industry, 2008-2009

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Abstracts

In 2009 H1, Chinese home appliance industry continued to decline. From January to May, 2009, sales revenue of this industry totaled RMB 266.104 billion, dropping by 7.71% YOY. The profit reached RMB 10.359 billion, rising by RMB 1.32 billion YOY.

From January to June, 2009, production of Chinese home gas utensils was 11.9001 million, growing by 0.13% YOY. Productions of Guangdong, Hubei, Zhejiang, Hunan and Beijing ranked among the TOP 5, whose total production accounted for 94.57% of that in China. Beijing, Hubei, Zhejiang and Hunan obtained the highest YOY growth rates.

From January to June, 2009, production of Chinese home gas heaters was 4.209 million. Productions of Guangdong, Shanghai, Jiangsu, Chongqing and Sichuan ranked among the TOP 5, whose total production took up 98.69% of that in China.

From January to June, 2009, production of Chinese home washing machines reached 20.056 million. Productions of Zhejiang, Anhui, Jiangsu, Shandong and Guangdong ranked among the Top 5, whose total production occupied 83.00% of that in China.

From January to June, production of Chinese home vacuum cleaners totaled 24.416 million. Production of Guangdong, Jiangsu, Zhejiang, Tianjin and Shanghai accounted for approximately 100% of that in China.

From January to June, 2009, production of Chinese home refrigerators reached 30.044 million, rising by 9.20% YOY. Productions of Anhui, Guangdong, Shandong, Zhejiang and Jiangsu ranked among the Top 5, whose total production took up 81.23% of that in China. Sichuan, Beijing, Anhui, Jiangxi and Jiangsu achieved the highest YOY growth

rates.

From January to June, 2009, production of Chinese room air conditioners reached 45.328 million, falling by 20.00% YOY. Productions of Guangdong, Anhui, Jiangsu, Tianjin and Hubei ranked among the Top 5, whose total production took up 79.40% of that in China. Anhui, Jiangxi and some other regions achieved the highest YOY growth rates.

From 2008 H2 to 2009 H1, Chinese central government issued a series of policies to stimulate domestic demands for home appliances. Implementation Measures on Replacement of Household Electrical Appliances and the policy of home appliances going to the countryside are regarded as the most important ones.

According to the policy of home appliances going to the countryside, Chinese governments give financial subsidies for farmers to buy home appliances (color TV, refrigerator, washing machine and cell phone). After purchasing home appliances, customers can receive subsidies from their township financial departments on the basis of the purchase vouchers and IDs.

Investigation shows that every 100 Chinese rural households possess only 2/3 of the number of color TVs of urban households (1/2 of numbers of washing machines and cell phones at most, 1/4 of the number of refrigerators). Currently, the popularization degree of home appliances in Chinese rural areas is only equal to that of urban areas at the end of 1980s.

To cope with the financial crisis, Chinese central government promotes the policy of home appliances going to the countryside over China and releases financial subsidies for farmers to purchase home appliances. This will stimulate domestic demands of Chinese home appliance industry; exploit potentials of Chinese rural consumption market; relieve difficulties of Chinese home appliance industry.

On June 28th, 2009, Implementation Measures on Replacement of Household Electrical Appliances was issued by China Ministry of Finance, China Ministry of Commerce, National Development and Reform Commission, China Ministry of Industry and Information Technology, China Ministry of Environmental Protection, State Administration for Industry & Commerce (SAIC) and China General Administration of Quality Supervision, Inspection and Quarantine. It gives the concrete guidance on the subsidy measures, procedures and implementation of trade-in of household appliances. Different from the policy of home appliances going to the countryside (only in rural

markets), the policy of Replacement of Household Electrical Appliances focuses on urban consumers. Subsidies will be given to consumers when they purchase home appliances and sales sectors can apply for these subsidies from Chinese financial departments.

Domestically, home appliance enterprises are transferring the expansion focus from large and medium cities to township and rural markets, from southeast coastal areas to undeveloped areas in Central China and West China.

Globally, Chinese home appliance enterprises will enhance the expansion of the international market and adopt the strategy of diversifying markets. Chinese home appliance industry should seize opportunities in emerging markets such as Middle East and Africa when export to European and American markets dropped sharply.

Through this report, readers can acquire more information:

- Operation of Chinese home appliance manufacturing industry, 2008-2009 H1
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- Production of Chinese refrigerators, 2008-2009 H1
- Production of Chinese home air conditioners, 2008-2009 H1
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- Supporting policies of Chinese central government on the home appliance manufacturing industry, 2008-2009
- Prediction on the development of Chinese home appliance manufacturing industry

Following persons are recommended to buy this report:

- Home appliance manufacturers
- Home appliance distributors
- Investors concerning Chinese home appliance industry
- Research institutions concerning Chinese home appliance industry
- Other persons concerning Chinese home appliance industry

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