Research on Wall Mounted Gas Boiler Market in China, 2012-2016

(Excerpt)

Huidian Research

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4. Characteristics of Power Socket

4.1 Concentration and Forecast

4.1.1 Regional Concentration

Since its introduced by Clipsal and Panasonic in the middle of 1980s, the power socket of China has experienced split and combination, which is mainly concentrated in the areas of Guangdong, Jiangsu and Zhejiang, as well as some electric enterprises in Shanghai, Hunan and other regions, among which the production scale in Guangdong, Jiangsu and Zhejiang occupies about nine out of ten national total.

4. Status Quo of China’s Wall Mounted Gas Boiler Industry

4.1 Industrial Status Quo

After the development of many years, gas boiler has become the third largest gas products in China after gas water heater and gas stove products. By the end of September 2011, there are 85 manufacturers which own gas water boiler production license, of which 22 manufacturers are increased in 2011 (14 of them are Guangdong Enterprises), wall mounted gas boiler brands have reached more than 500.

4.1.1 Product Marketing Structure

Currently, the wall mounted gas boilers can be divided into three categories:

The first category is imported products. Such as European brands Immergas, BAXI, CHAPPEE and ROCA; South Korea brands Daewoo, LOTTE and S-line. Such products are produced in foreign countries completely, the products have more stable performance and better quality, but the prices are higher and mainly occupy the high-end market share.

The second category is that the manufacturers of European and South Korea set up plants in China. Many foreign brands have set up production bases in China such as European brands Vaillant, Viessmann, Ariston, and Ferroli as well as South Korean brands KyungDong, KITURAmi, Dae-Won and Olynpia. This kind of foreign brands which produced in China take use of the brand and price advantages to occupy more than 50% of the total market.

The third category is the joint venture product or domestic production product with technology introduction. Currently, almost all the major domestic first-line gas appliance enterprises produce wall mounted gas boilers, such as Macro, Jinsiyan, Vanward, Midea and VATTI; there are many second and third tier brands, too. The number of this category of enterprises is about 100 and the qualities are uneven. Although this kind of products
can’t compare with imported products or foreign products, they occupy a certain market share due to the low price and high performance.

4.1.2 Brands

The brands of wall mounted gas boiler can be divided into German brands, European brands (except German brands) and domestic brands. The number of German brands is less; European brands (except German brands) mainly include Italian and French brands, of which the Italian brands are relatively more; and domestic enterprises have tens of brands.

Currently, the domestic wall mounted gas boiler market structure is mainly composed by German brands, European brands (except German brands) and domestic brands. European products occupy the leading position due to the excellent quality. Main production countries are Germany, Italy and France; more Italian brands have entered into China’s market.

Fig.9 Brands in China's Wall Mounted Gas Boiler Market

<table>
<thead>
<tr>
<th>Country</th>
<th>Brands</th>
</tr>
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<tbody>
<tr>
<td>German Brands</td>
<td>Vaillant, Viessmann, Bosch, etc.</td>
</tr>
<tr>
<td>Italian Brands</td>
<td>Roly, Beretta, BAXI, Immergas, etc.</td>
</tr>
<tr>
<td>South Korean Brands</td>
<td>Daewo, KyungDong, Korean First and KITURAmi, etc.</td>
</tr>
<tr>
<td>Chinese Brands</td>
<td>Squirrel, Macro, Vanward, Chant, YIMA, Peskoe, KyungDong, ROC, Chappee, BonComm, Ariston, Midea, Hige, Haydn, BAXI, Auron, Smith, Goepe, Beidinauan, Beidinuan, Best, etc.</td>
</tr>
</tbody>
</table>

Source: Huidian Research

German products occupy the leading position due to the excellent quality; the mainstream of Italian brands are IMMERGAS, Beretta, BAXI, Ferroli and Ariston, the products occupy the large market share due to the better performance, stylish appearance and relative low price; South Korean products entered China’s market earlier, once occupied a certain market rely on the price and appearance advantages, but the quality and technology are lagging behind compares with European countries, the market share shows a downward trend.

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