China Seawater Desalination Industry Report, 2011-2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include International Desalination Association (IDA), China Desalination Association(CDA), and The Membrane Industry Association of China (MIAC) etc .

Abstract

As of the end of 2011, China's seawater desalination capacity reached 660 kilotons per day, and the figure, as scheduled, will hit 2.2-2.6 million tons per day in 2015.

In recent years, world's renowned corporations in the water treatment engineering field have sped up their inrush to Chinese seawater desalination market.

Veolia Water entered Chinese water treatment market early in 1997, now with over 15 projects in China, mainly in Tianjin, Shanghai, Beijing, Shandong, Shaanxi, etc.

ProMinent stepped into seawater desalination market of China in 2001, now with more than six built-up seawater desalination projects there.

Israel Desalination Enterprises (IDE) Technologies tapped into Chinese seawater desalination market in 2007, and it has already constructed one seawater desalination project in Tianjin.

Hyflux accessed Chinese market in 2009, and has set up Tianjin Dagang Seawater Desalination Plant.

Aqualyng began the construction of seawater desalination project in China since 2010, now owning one seawater desalination project in Tangshan, Hebei.

Compared with foreign counterparts, Chinese seawater desalination engineering companies seem weaker. Although China Shipbuilding Industry Corporation, ZhongHe Seawater Desalination Engineering Co., Ltd., Wuhan Kaidi Water Service Co., Ltd, etc. are making unrelenting efforts in market exploitation, while with respect to key, large-scale seawater desalination project, international giants' participation in construction still needs to be recommended for the time being.

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In terms of seawater desalination equipment, it mainly relies on the supply of international giants. Reverse osmosis membrane, for example, saw its market share merely rise from 3% in 2005 to around 15% in 2010 although domestic Chinese companies have experienced rapid growth for the past few year.

China Seawater Desalination Industry Report, 2011-2012 by ResearchInChina mainly covers the followings:

1. Analysis and forecast on overall capacity and production of global seawater desalination industry, as well as the analysis on seawater desalination market in some nations;

2. Analysis on market size, competition, cost trends and policy environment of Chinese seawater desalination industry;

3. Analysis on status quo and development of Chinese seawater desalination industry in key areas;

4. Forecast on market capacity, investment trends and demand of key equipment manufacturing of China seawater desalination industry;

5. Operation of global top seawater desalination engineering corporations, andbrief analysis on their projects in China;

6. Analysis on operation, investment & expansion projects of key Chinese seawater desalination equipment manufacturing and construction enterprises.

Vontron Technology Co.,Ltd., a subsidiary of South Huiton Co., Ltd., presently owns two bases in Guiyang and Beijing, of which, Guiyang Vontron Technology's reverse osmosis membrane capacity has arrived at six million square meters per year, with gross margin maintaining at 38% or so.

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In 2011, **Shenzhen Hifuture Electric Co.,Ltd** was expandihg PI fiber production line. At present, its 3,000-ton PI fiber production line has finished 26% construction, and the subsidiary Changchun Hipolyking Co., Ltd. has built up capacity of 300 tons; following the late-stage capacity release of 2,900-ton filter materials, its sales volume will further grow.

As of 2011, membrane material capacity of **Tianjin Motimo Membrane Technology Co., Ltd.** hit 1.1 million square meters per annum, and the membrane production line started high load operation since November 2010. Meanwhile, in February 2012, it announced IPO plan, planning to invest RMB122 million in the construction of 1.8 million-square-meter/a hollow fiber membrane yarn (for solution-method seawater desalination pretreatment) production line.

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