China Seawater Desalination Industry Report, 2011-2012

May 2012
**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.
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, and brief 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.
In 2011, Shenzhen Hifuture Electric Co., Ltd was expanding 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.
1. Overview of Seawater Desalination Industry
   1.1 Definition and Classification
   1.2 Technology Introduction
   1.3 Industry Chain

2. Global Seawater Desalination Industry
   2.1 Status Quo
      2.1.1 Industry Development
      2.1.2 Capacity Growth Forecast
   2.2 Saudi Arabia
      2.2.1 Status Quo
      2.2.2 Project Introduction
   2.3 Israel
      2.3.1 Status Quo
      2.3.2 Government to Raise Seawater Desalination Indicators
   2.4 Singapore
      2.4.1 Development of Water Resources
      2.4.2 Construction of Seawater Desalination Projects
   2.5 Spain
      2.5.1 Status Quo
      2.5.2 Spanish Companies Aim at Development Opportunities

3. China Seawater Desalination Industry
   3.1 Seawater Utilization
   3.2 Market Size

4. Key Engineering Companies in Global Seawater Desalination Industry
   4.1 IDE
      4.1.1 Profile
      4.1.2 Engineering Cases about Water Treatment Business
   4.2 Veolia

5. Key Equipment Manufacturing Companies in China Seawater Desalination Industry
   5.1 Tianjin MOTIMO Membrane Technology Co., Ltd.
   5.2 Vontron Technology Co., Ltd.
   5.3 Beijing Originwater Technology Co., Ltd.
   5.4 Shenzhen HiFuture Electric Co., Ltd.
   5.5 Shuangliang Eco-Energy Systems Co., Ltd
   5.6 Others

6. Key Engineering Companies in China Seawater Desalination Industry
   6.1 China Shipbuilding Industry Company Limited
      6.1.1 Profile
      6.1.2 Operation
      6.1.3 Seawater Desalination Business
   6.2 Hebei Guohua Cangdong Power Generating Co., Ltd.
   6.3 Wuhan Kaidi Water Service Co., Ltd
   6.4 Zhonghe Seawater Desalination Engineering CO., Ltd.
   6.5 Tianjin Beijiang Power Plant
Selected Charts

- Classification of Seawater Desalination Methods
- Proportion of Global Seawater Desalination Methods
- Comprehensive Energy Consumption Comparison of Seawater Desalination Industry
- Schematic Diagram of China Seawater Desalination Industry Chain
- Output Distribution of Global Seawater Desalination Industry
- Market Share of Seawater Desalination Methods in Main Regions Worldwide
- Seawater Desalination Capacity of U.S., Saudi Arabia and Japan by 2010
- Seawater Desalination of Some Coastal Countries (Outside the Middle East), 1997-2015
- Supply and Demand Forecast of Israeli Water Resources, 1998-2020
- Total Output of Desalination Water in Spain, 1980-2006
- Output of Span’s Three Seawater Desalination Plants in Mediterranean
- Major International Project Distribution of Spanish Seawater Desalination Companies
- Overall Development Objective of China Seawater Utilization, 2010-2020
- Finished Seawater Utilization Projects and Scale in China, 2007-2010
- Seawater Desalination Capacity and Forecast in China, 2005-2020
- Proportion of Seawater Desalination Methods in China
- Seawater Desalination Support Policies in China (Partial), 2005-2012
- Project Comparison of Key World’s Seawater Desalination Engineering Corporations in China by 2011
- Operating Revenue and Profit of China’s Key Seawater Desalination Equipment Manufacturers, 2011
- Key Seawater Desalination Projects in China, 2005-2012
- Investment Structure Forecast of Reverse Osmosis Desalination Projects in China, 2015
- Proportion of China Membrane Technology in Global Market, 2006-2010
• Consumption Forecast of Global and China Copper Alloy Tube Industry by Sector, 2010-2013
• Titanium Demand Forecast of China Seawater Desalination Industry, 2010-2050
• Development Targets of China’s Seawater Utilization by Region, 2010-2020
• Construction Cases of Water Treatment Business of IDE Technologies, 2006-2013
• Key Operating Indicators of Veolia Water, 2010
• Operating Revenue Breakdown of Veolia Water (by Region), 2010
• Workforce of Veolia Water (by Region), 2010
• Business Indicators of Veolia Water, 2010
• Development Course of Veolia Water in China since 1997
• Development Course of Aqualyng’s Seawater Desalination Business
• Major Seawater Desalination Project Data of ProMinent in China
• Development Course of SWCC’s Seawater Desalination Business since 1928
• Membrane Material Application Classification of Tianjin Motimo Membrane Technology
• Operating Revenue and Growth Rate of Tianjin Motimo Membrane Technology, 2009-2011
• Revenue and Gross Margin of Tianjin Motimo Membrane Technology by Business, 2009-2011
• Capacity, Output and Sales-Output Ratio of Tianjin Motimo Membrane Technology, 2009-2011
• Main Purposes of IPO Funds of Tianjin Motimo Membrane Technology, 2012
• Operating Revenue and Growth Rate of South Huiton Co., Ltd. (Parent Company), 2006-2011
• Net Income and Growth Rate of South Huiton Co., Ltd. (Parent Company), 2006-2011
• Operating Revenue and Profit of Vontron Technology Co., Ltd., 2007-2011
• Operating Revenue and Growth Rate of Beijing Origin Water Technology Company, 2007-2011
• Net Income and Growth Rate of Beijing Origin Water Technology Company, 2007-2011
• Operating Revenue and Net Income of Headquarter and Subsidiaries of Beijing Origin Water Technology Company, 2011
• Membrane Capacity Expansion Plans of Beijing Origin Water Technology Company, 2010-2014
• Operating Revenue and Growth Rate of Shenzhen Hifuture Electric Co., Ltd, 2004-2011
Selected Charts

- Net Income and Growth Rate of Shenzhen Hifuture Electric Co., Ltd, 2004-2011
- Operating Revenue and Growth Rate of Shuangliang Eco-Energy Systems Co., Ltd, 2006-2011
- Operating Revenue, Cost and Gross Margin of Zhejiang Hailiang Co., Ltd. (by Sector or Product), H1 2011
- Copper Tube Capacity of Zhejiang Hailiang Co., Ltd. by 2011
- Operating Revenue and Growth Rate of Nanfang Pump Industry Co., Ltd., 2007-2011
- Net Income and Growth Rate of Nanfang Pump Industry Co., Ltd., 2007-2011
- Operating Revenue and Growth Rate of Zhejiang JIULI Hi-tech Metals Co., Ltd., 2006-2011
- Net Income and Growth Rate of Zhejiang JIULI Hi-tech Metals Co., Ltd., 2006-2011
- Production Line Capacity and Output Forecast of Zhejiang JIULI Hi-tech Metals Co., Ltd., 2011-2014
- Operating Revenue and Growth Rate of China Shipbuilding Industry Corporation, 2006-2011
- Net Income and Growth Rate of China Shipbuilding Industry Corporation, 2006-2011
- Operating Revenue, Cost and Profit of Hebei Guohua Cangdong Power Generating Co., Ltd., 2006-2011
- Operating Revenue, Cost and Profit of Wuhan Kaidi Water Service Co., Ltd, 2005-2011
- Performance of Seawater Treatment Projects of Wuhan Kaidi Water Service Co., Ltd
- Operating Revenue, Cost and Profit of ZhongHe Seawater Desalination Engineering Co., Ltd., 2008-2011
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