



# China Dust Removal Equipment Industry

Report, 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.

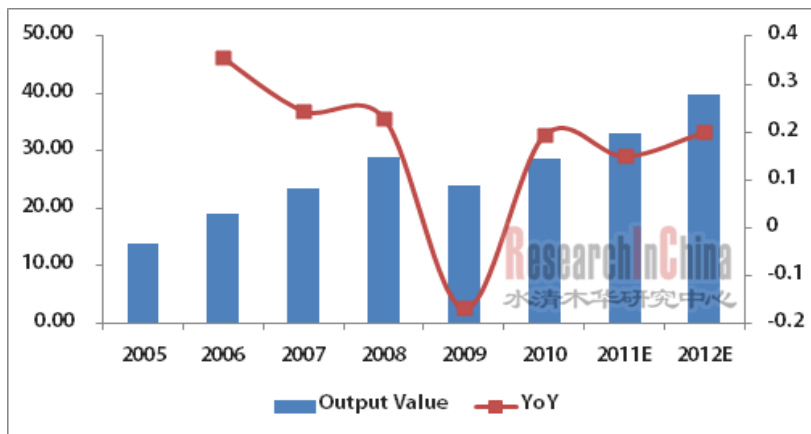
## INFORMATION SOURCES

The primary information sources include China Customs, National Statistics Bureau of China, and Bag Filter Committee of China Association of Environmental Protection Industry etc.

## Abstract

Dust removal equipment finds wide application in cement, steel, non ferrous metal, electric power and other highly dust polluting industries. In China, driven by the ever more strict standards for discharge of pollutants from these sectors, the dust removal equipment industry have seen rapid development over the recent years, with output value climbing 19.3% YoY to RMB28.81 billion, and expected to hit RMB39.76 billion in 2012.

### Output Value of China Dust Removal Equipment Industry, 2005-2012E (RMB bn)



Source: China Association of Environmental Protection Industry, ResearchInChina: China Dust Removal Equipment Industry Report, 2012

China Dust Removal Equipment Industry Report, 2012 mainly covers the followings: dust removal industry scale, industry status and import & export of two market segments, i.e., bag- and electrostatic-type dust removal equipment, application status of five downstream sectors such as cement and thermal power, market capacity forecast, as well as major corporate operations.

In China, cement, steel, non-ferrous metal and municipal sectors chiefly employ bag dust remover, while thermal power industry generally use electrostatic dust remover; with the improved standards for emission of pollutants, bag dust remover will soon witness a growing proportion of application in these sectors.

In China's cement industry, bag dust remover enjoy a usage percentage of around 80%, largely deployed by the new-type dry process cement production lines built after 2009.

China thermal power industry further lowers soot emission limits in 2012, the thermal power units to be built in the future will adopt bag dust removal equipments with higher dust collection efficiency, coupled with the transformation requirements for original dust removal equipments, it is expected that from 2011 to 2013, the annual demand from China thermal power industry for bag dust removal equipments will be approximately RMB4.1 billion. Zhejiang Feida Environmental Science & Technology Co., Ltd. and Fujian Longking Co., Ltd are the key players in this domain.

Both China's steel and non-ferrous metal industries are confronted with tasks of energy conservation, backward capacity elimination, annexation and reorganization of enterprises, etc., and dust removal equipment is necessary in the process of reconstruction.

Fujian Longking Co., Ltd. is mainly dedicated to the manufacture of air pollution control equipments like dust remover, desulfurization and denitrification installations, etc., with dust removal equipments primarily employed in thermal power industry and contributing revenue of RMB2.243 billion in 2011, thus awarded as first place in dust removal equipment industry. It has three subsidiaries involving in this business, respectively located in Xi'an, Wuhan and Suqian.

As the leading enterprise in Chinese air pollution control industry, also the world's largest supplier of electric dust precipitator for coal-fired power plants, Zhejiang Feida Environmental Science & Technology Co., Ltd. in 2011 obtained revenue of RMB1.041 billion from electrostatic dust remover and RMB133 million from bag dust remover. Under the circumstance of comparatively sluggish electric dust precipitator market in China, it actively explores Southeast Asia and other overseas markets, realizing export earnings of RMB326 million in 2011.

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### 1. Overview

- 1.1 Industry Definition
- 1.2 Technical Comparison

### 2. Market

- 2.1 Industry Background
  - 2.1.1 Industrial Pollution
  - 2.1.2 Policy
- 2.2 Industry Overview
  - 2.2.1 Industry Scale
  - 2.2.2 Industry Structure
- 2.3 Major Enterprises
- 2.4 Electrostatic Dust Removal Equipment
  - 2.4.1 Market Size
  - 2.4.2 Import and Export
- 2.5 Bag Dust Removal Equipment
  - 2.5.1 Market Size
  - 2.5.2 Import and Export
  - 2.5.3 Application Prospect

### 3. Downstream Application

- 3.1 Cement Industry
  - 3.1.1 Policy
  - 3.1.2 Market Size
- 3.2 Electric Power Industry
- 3.3 Iron & Steel Industry
- 3.4 Non-Ferrous Metal Industry
- 3.5 Municipal Industry

### 4. Key Enterprises

- 4.1 Fujian Longking Co., Ltd.
  - 4.1.1 Profile
  - 4.1.2 Operation
  - 4.1.3 Revenue Structure
  - 4.1.4 Gross Margin
  - 4.1.5 Dust Removal Equipment Business
- 4.2 Zhejiang Feida Environmental Science & Technology Co., Ltd.
  - 4.2.1 Profile
  - 4.2.2 Operation
  - 4.2.3 Revenue Structure
  - 4.2.4 Gross Margin
  - 4.2.5 Dust Remover Business
- 4.3 Jiehua Holdings Co., Ltd.
  - 4.3.1 Profile
  - 4.3.2 Operation
  - 4.3.3 Revenue Structure
  - 4.3.4 Gross Margin
  - 4.3.5 Capacity and Output
  - 4.3.6 Projects under Construction
- 4.4 Kelin Environmental Protection Equipment, Inc.
  - 4.4.1 Profile
  - 4.4.2 Operation
  - 4.4.3 Revenue Structure
  - 4.4.4 Business Segments
  - 4.4.5 Gross Margin
  - 4.4.6 R&D and Investment
- 4.4.7 Client and Supplier
- 4.4.8 Forecast and Outlook
- 4.5 Jiangsu Xinzhong Environmental Protective Co., Ltd.
  - 4.5.1 Profile
  - 4.5.2 Operation
  - 4.5.3 Raising Investment Projects
- 4.6 Hefei Cement Research & Design Institute
- 4.7 Anhui Shengyun Eco-Friendly Equipment Co., Ltd
- 4.8 Wuhan Kaidi Blue Sky Science & Technology Co., Ltd
- 4.9 Tsinghua Tongfang(Anshan) Environmental Protection Equipment Co., Ltd
- 4.10 Tiancheng Environmental Protection Equipment Co., Ltd.
- 4.11 Jiangsu Ruifan Environmental Protection Equipment Inc.
- 4.12 Sinoma (Henan) Environmental Protection Co., Ltd.
- 4.13 Shanghai LingQiao E.P.E.W. Co., Ltd.

- Comparison between Bag- and Electrostatic-Type Dust Removal Technology
- (Industrial) Soot Emissions in China, 2000-2010
- Relevant Policies in China
- Output Value of China Dust Removal Equipment Industry, 2005-2012E
- Structure of China Dust Removal Equipment Industry, 2005-2010
- Major Enterprises in China Dust Removal Equipment Industry, 2011
- Output Value and Growth Rate of China Electrostatic Dust Removal Equipment Industry, 2005-2012
- Import and Export Volume of Electrostatic Dust Remover in China, 2009-2012
- Import and Export Value of Electrostatic Dust Remover in China, 2009-2012
- Output Value and Growth Rate of China Bag Dust Removal Equipment Industry, 2005-2012E
- Gross Output Value of Host and EPC of China Bag Dust Removal Industry, 2005-2012E
- Import and Export Volume of Bag Dust Remover in China, 2009-2012
- Import and Export Value of Bag Dust Remover in China, 2009-2012
- Application Structure of Bag Dust Removal Equipment by Industry, 2010
- Output and Growth Rate of Cement in China, 2003-2011
- Market Size of Bag Dust Remover in China Cement Industry, 2009-2013E
- New Installed Capacity and YoY Growth Rate of Thermal Power in China, 2005-2012
- Output and YoY Growth Rate of Crude Steel in China, 2003-2012
- Market Size of Bag Dust Removal Equipment in China Non-Ferrous Metal Industry, 2006-2012E
- Revenue and Net Income of Fujian Longking, 2009-2012
- Revenue Breakdown of Fujian Longking by Product, 2009-2011
- Revenue Structure of Fujian Longking by Product, 2009-2011
- Revenue Breakdown by Region, 2009-2011
- Revenue Structure by Region, 2009-2011
- Gross Margin by Product, 2009-2011

- Revenue and YoY Growth Rate of Dust Remover Business of Fujian Longking, 2009-2011
- Introduction of Xi'an Xikuang Environmental Protection Co., Ltd
- Wuhan LongKing Co.,Ltd.
- Introduction to Suqian Longking EcoTech Co.,Ltd.
- Revenue and Net Income of Zhejiang Feida Environmental Science & Technology, 2009-2012
- Revenue Breakdown of Zhejiang Feida Environmental Science & Technology by Product, 2009-2011
- Revenue Structure of Zhejiang Feida Environmental Science & Technology by Product, 2009-2011
- Revenue Breakdown of Zhejiang Feida Environmental Science & Technology by Region, 2009-2011
- Revenue Structure of Zhejiang Feida Environmental Science & Technology by Region, 2009-2011
- Gross Margin of Zhejiang Feida Environmental Science & Technology by Product, 2009-2011
- Introduction to Zhejiang Feida Environmental Engineering Co., Ltd.
- Introduction to Zhejiang Feida Electrical Engineering Co., Ltd.
- Zhuji Feida Environmental Steel Structure Equipment Installation Co., Ltd.
- Revenue and Net Income of Jiehua Holdings, 2009-2011
- Revenue Breakdown of Jiehua Holdings by Product, 2009-2011
- Revenue Structure of Jiehua Holdings by Product, 2009-2011
- Revenue Breakdown of Jiehua Holdings by Region, 2009-2011
- Revenue Structure of Jiehua Holdings by Region, 2009-2011
- Gross Margin of Jiehua Holdings by Product, 2009-2011
- Capacity and Output of Jiehua Holdings, 2009-2011
- Projects under Construction of Jiehua Holdings, 2012
- Revenue of Jiehua Holdings, 2010-2014E
- Revenue and Net Income of Kelin Environmental Protection Equipment, 2007-2011
- Revenue Breakdown of Kelin Environmental Protection Equipment by Sector, 2007-2011
- Revenue Structure by Sector, 2007-2011

- Revenue Breakdown by Region, 2007-2011
- Revenue Structure of Kelin Environmental Protection Equipment by Region, 2007-2011
- Revenue and YoY Growth Rate of Dust Remover of Kelin Environmental Protection Equipment, 2007-2011
- Product Gross Margin of Kelin Environmental Protection Equipment by Sector, 2007-2011
- R&D Costs and % of Revenue of Kelin Environmental Protection Equipment, 2007-2011
- Kelin Environmental Protection Equipment's Revenue from Top 5 Clients and % of Total Revenue, 2007-2011
- Name List and Revenue Contribution of Kelin Environmental Protection Equipment's Top 5 Clients, 2011
- Kelin Environmental Protection Equipment's Procurement from Top 5 Suppliers and % of Total Procurement, 2007-2011
- Revenue and YoY Growth Rate of Kelin Environmental Protection Equipment, 2010-2014E
- Revenue and Total Profit of Jiangsu Xinzhong Environmental Protective, 2007-2010
- Sales Volume of Dust Removal Equipment of Jiangsu Xinzhong Environmental Protective, 2007-2010
- Revenue of Jiangsu Xinzhong Environmental Protective by Product, 2008-2010
- Revenue of Wuhan Kaidi Blue Sky Science & Technology, 2007-2009
- Revenue of Jiangsu Ruifan Environmental Protection Equipment, 2007-2009
- Revenue of Sinoma (Henan) Environmental Protection, 2007-2009
- Revenue of Shanghai LingQiao E.P.E.W., 2007-2009



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