



Global and China High Performance Membrane Material Industry Report, 2012

Sept. 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.

Abstract

High-performance membrane material is listed as one of the top 10 special projects in the 12th Five-Year Development Plan for New Materials Industry released by the Ministry of Industry and Information Technology in 2012, according to which, the independent production of water treatment membrane, battery separator and optical polyester film should be realized by 2015 to enhance self-sufficiency rate of these products. However, water treatment membrane, optical film and lithium battery separator are still in their infancy in China and are expected to witness a boom driven by the twin engines of policies and market demand.

1. Water Treatment Membrane

Water treatment membrane, a kind of material featuring selective separation function, mainly consists of microfiltration membrane, ultrafiltration membrane, nanofiltration membrane and reverse osmosis membrane, and finds application in such fields as desalination of sea water and urban sewage treatment. In 2011, the market size of global membrane component approximated USD10.8 billion, of which the market size in China reached roughly RMB10 billion, comprising around 15% of the global total.

Only a few enterprises are capable of carrying out independent R&D and intensive production of membrane and membrane component, and European-American and Japanese companies are the leading players. Hydranautics, Dow Chemical and Toray are the world's leading manufacturers of reverse osmosis membrane and nanofiltration membrane, and Veolia and Siemens are the global leading producers of microfiltration membrane and ultrafiltration membrane.

China can rival with the world in research into micro/ultrafiltration membrane, and home-grown products make up more than 60% market share, with Beijing Origin Water Technology and Tianjin Motimo Membrane Technology serving as major producers. Though they have achieved localization of reverse osmosis membrane and nanofiltration membrane, Chinese companies still lag far behind foreign counterparts in technology. The domestic market is still occupied by such foreign giants as Hydranautics and Dow Chemical.

2. Optical Film

Optical films, which include reflecting film, antireflection film, polarizing film, brightness enhancement film, window film and so forth, are principally applied in LCD industry and partly in automotive glass and building windows. The global shipment of LCD panels totaled 112 million square meters in 2011, and Chinese Mainland has become the largest consumer of LCD panel worldwide. As the global LCD panel capacity keeps being transferred to Mainland China, the demand for optical films will balloon as well.

The optical film industry which supports LCD panel is relatively underdeveloped in China. In recent years, a small number of domestic enterprises have made technical breakthroughs in optical film and possessed intensive production capacity, but they can only produce medium and low-end products and still have a long way to go in high-end membrane area. Ningbo Exciton New Material Technology is the most typical one and has realized mass-production of reflection membrane and diffusion film.

3. Lithium Battery Separator

The global lithium battery separator industry features a high concentration degree, and the top three companies, namely, Asahi Kasei, Polypore and Tonen, together hold a market share of over 60%. The leading Chinese manufacturers of lithium battery separator include Shenzhen Senior Technology Material Co., Ltd. and Jinhui Hi-tech which boasted annual lithium battery separator capacity of 90 million m² and 65 million m² respectively in 2011.

The report highlights the followings:

- Overview of high-performance membrane and related policies in National 12th Five-Year Plan(2011-2015);
- Market size, product mix, competitive landscape and development trends of global and Chinese water treatment membrane industry; Market size, competition pattern and otherwise of optical film industry in China and beyond;
- Market scale, competition structure and projects planned and under construction of global and Chinese lithium battery separator industry;
- Operation, membrane material business and development of 10 high-performance membrane material manufacturers both at home and abroad.

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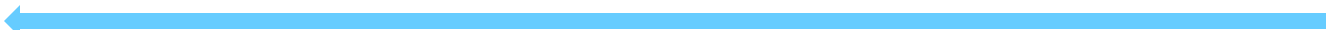
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