



Global and China Separating Membrane Industry Report, 2013-2016

Dec. 2013

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 Company Reports, and National Bureau of Statistics of China etc.

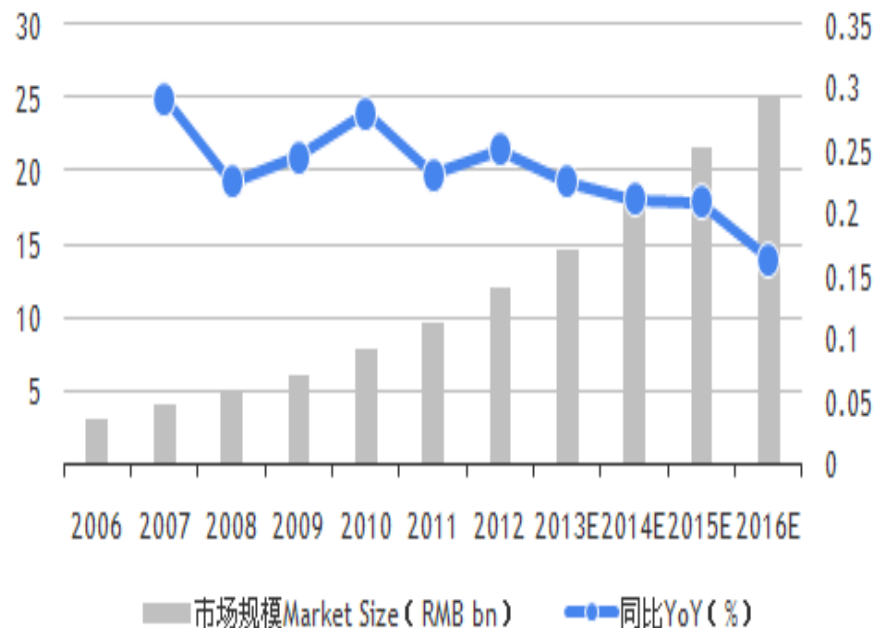
Abstract

Separating membrane is a kind of thin-layer substance with selective penetration function. It is for the use of concentration, separation and purification, and is widely applied in the sectors such as environment, energy, chemical, electronics, pharmaceuticals and food.

In 2012, the global market scale of separating membrane products approached USD12 billion, of which, the market size of reverse osmosis membrane (including nanofiltration membrane), micro-filtration membrane and ultrafiltration membrane stood at around 95%. Worldwide, industrial players from Japan and the United States play a more dominant role, cases including Toray Industries, Mitsubishi Rayon, Asahi Kasei Corporation in all professional in micro-filtration and ultrafiltration membrane fields, as well as Hydranautics, The Dow Chemical Company, and GE in reverse osmosis membrane/nanofiltration membrane arenas.

China separating membrane market has witnessed robust development with the growth pace keeping at 20%-30% in last ten years, albeit as a later starter. In 2012, the size of China separating membrane products market approximated RMB12 billion, with the proportion worldwide soaring to 16.3%. It is projected that China separating membrane market will continue its growth rate by around 20% in the upcoming years and that the figure by 2016 will jump to roughly RMB25 billion.

Market Scale and Growth Rate of Separating Membrane Products in China, 2006-2016



Source: ResearchInChina

Copyright 2012 ResearchInChina

An integrated membrane industrial system has taken shape in China, with major products covering reverse osmosis membrane, micro-filtration membrane and ultrafiltration membrane with the market scale making up around 92%. Other separating membrane products include electric-driven membrane, gas separation membrane, medical membrane, etc.

China micro-filtration membrane and ultrafiltration membrane markets demonstrate the fiercest competition, with the market occupancy nationwide exceeding 60%. China has more than 100 micro-filtration membrane and ultrafiltration membrane manufacturers consisting of Beijing Origin Water Technology, MOTIMO, and LITREE. However, foreign counterparts, such as Toray Industries and Asahi Kasei Corporation, are still taking a dominant position in high-end fields such as ultrapure water for electronic industry use, electrophoresis paint recycling, pharmaceutical, and enzymic preparation fields.

Separating membrane is made from organic or inorganic materials. And inorganic materials are mainly ceramic and metal, while organic materials mainly refer to all kinds of chemical raw materials. For example, the reverse osmosis membrane is commonly made from aromatic polyamide, while micro-filtration membrane and ultrafiltration membrane is mainly made from PVDF, polysulfone, PES and PVC, etc. Presently, China has a small number of companies involving in the production of membrane raw materials. Coupled with unstable quality, China imports around 60% membrane raw material resin.

The report highlights:

- ✘ Market Scale, Product Structure and Competition Pattern in Global Separating Membrane Industry;
- ✘ Market Scale, Product Structure ,Competition Pattern, Membrane Materials, Development Objectives in China Separating Membrane Industry;
- ✘ Market Scale, Competition Pattern, and Development Trend of China Water Treatment Membrane Industry;
- ✘ Overview and Competition Pattern of Other Separating Membrane Markets in China;
- ✘ Operation, Separating Membrane Business, Development Prediction of 15 Separating Membrane Producers in China and Beyond

1. Overview of the Separating Membrane Industry

- 1.1 Overview
- 1.2 Classification
- 1.3 Industrial Chain

2. Global Separating Membrane Market

- 2.1 Market Scale
- 2.2 Product Structure
- 2.3 Competition Pattern

3. China Separating Membrane Market

- 3.1 Market Scale
- 3.2 Product Structure
- 3.3 Competition Pattern
- 3.4 Membrane Materials
- 3.5 Development Objective

4. China Separating Membrane Market Segments

- 4.1 Water Treatment Membrane
 - 4.1.1 Overview
 - 4.1.2 Policy
 - 4.1.3 Market Scale
 - 4.1.4 Competition Pattern
 - 4.1.5 Development Trend
- 4.2 Other Separating Membranes
 - 4.2.1 Electric-Driven Membrane
 - 4.2.2 Gas Separation Membrane
 - 4.2.3 Medical Membrane

- 4.2.4 Others

5. Major Companies Worldwide

- 5.1 Toray Industries, Inc
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Separating Membrane Business
- 5.2 Asahi Kasei Corporation
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Separating Membrane Business
- 5.3 NITTO Denko Corporation
- 5.4 Dow Chemical
- 5.5 GE

6. Key Chinese Enterprises

- 6.1 Beijing Origin Water Technology
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Revenue Structure
 - 6.1.4 Gross Margin
 - 6.1.5 Clients & Suppliers
 - 6.1.6 R&D
 - 6.1.7 Separating Membrane Business
 - 6.1.8 Prediction & Outlook
- 6.2 MOTIMO Membrane Technology
 - 6.2.1 Profile
 - 6.2.2 Operation

- 6.2.3 Revenue Structure
- 6.2.4 Gross Margin
- 6.2.5 Clients & Suppliers
- 6.2.6 R&D
- 6.2.7 Separating Membrane Business
- 6.2.8 Prediction & Outlook
- 6.3 South Huiton
- 6.4 LITREE Purifying Technology
- 6.5 Eurofilm
 - 6.5.1 Profile
 - 6.5.2 Separating Membrane Business
- 6.6 Hangzhou Water Treatment Technology Development Center
 - 6.6.1 Profile
 - 6.6.2 Separating Membrane Business
- 6.7 Suntar
 - 6.7.1 Profile
 - 6.7.2 Separating Membrane Business
- 6.8 Jilin Jinsai Technology Development
 - 6.8.1 Profile
 - 6.8.2 Separating Membrane Business
- 6.9 Zhaojin Motian
- 6.10 Nanjing Jiushi

7. Conclusion & Outlook

- 7.1 Conclusion
- 7.2 Outlook

- Classification of Separating Membrane by Raw Material
- Classification of Separating Membrane by Separating Mechanism
- Separating Membrane Industry Chain
- Market Scale and Growth Rate of Global Separating Membrane Product Industry, 2006-2013
- Product Structure of Global Separating Membrane Products Market, 2012
- Leading Enterprises in Global Separating Membrane Industry, 2013
- Market Scale and Growth Rate of China Separating Membrane Product Industry, 2006-2013
- % of China Separating Membrane Product Market Size in Global Total, 2006-2013
- Product Structure of China Separating Membrane Products Market, 2012
- Leading Enterprises in China Separating Membrane Industry, 2013
- Water Treatment Membrane Products and Their Raw Materials of Major Industrial Players Worldwide, 2013
- Development Objectives of China Separating Membrane Market Segments, 2015
- Introduction to Water Treatment Membrane
- Roadmap of Water Treatment Membrane Technology
- Policies Concerning Water Treatment Fields in China, 2011-2015
- Market Scale and YoY Growth of China Water Treatment Membrane Products Industry, 2006-2013
- Overview of China Water Treatment Membrane Market Segments, 2012
- Leading Chinese Water Treatment Membrane Enterprises and Their Capacities, 2012
- Overview of China Electric-Driven Membrane Market, 2013
- Leading Chinese Electric-Driven Membrane Enterprises and Their Products, 2013
- Leading Chinese Gas Separation Membrane Enterprises and Their Product Applications, 2013
- Major Chinese Hemodialyzer Producers and Their Primary Businesses, 2013
- Leading Business Divisions under Toray Industries and Their Major Products
- Net Sales and Net Income of Toray Industries, FY2009-FY2013
- Sales (%) of Toray Industries by Business Division, FY2013

- Net Sales and Operating Profit from Environment & Engineering Business Division of Toray Industries, FY2009-FY2013
- Separating Membrane Products and Applications of Toray Industries
- Primary Businesses of Leading 9 Subsidiaries under Asahi Kasei Corporation
- Net Sales and Net Income of Asahi Kasei Corporation, FY2009-FY2013
- Net Sales of Asahi Kasei Corporation by Business Division, FY2011-FY2013
- Net Sales of Asahi Kasei Corporation by Business Division, FY2011-FY2013 (%)
- Water Treatment Membrane Products of Asahi Kasei Corporation
- Application of Water Treatment Membrane Products of Asahi Kasei Corporation in Special Separation Field
- Major Products and Application of NITTO Denko Corporation
- Sales and Net Income of NITTO Denko Corporation, FY2009-FY2013
- Sales % of NITTO Denko Corporation by Product, FY2012-FY2013
- Sales and Operating Profit of NITTO Denko Corporation Medical & Membrane Business Sector by Product, FY2012-FY2013
- Main Separating Membrane Products and Application of NITTO Denko Corporation
- Net Sales and Net Income of Dow Chemical, 2008-2012
- Revenue Structure % of Dow Chemical by Business Division, 2012
- Sales and EBITDA of Dow Chemical Coatings and Infrastructure Solutions, 2010-2012
- Sales % of Dow Chemical Coatings and Infrastructure Solutions by Product, 2012
- Leading 8 Industrial Groups and Primary Businesses of GE
- Revenue and Net Income of GE, 2008-2012
- Revenue Structure of GE by Business Division, 2012
- Revenue and Profit from Power Generation & Water Treatment Business Division of GE, 2008-2012
- Revenue and Net Income of Beijing Origin Water Technology, 2009-2013
- Revenue Breakdown of Beijing Origin Water Technology by Product, 2011-2013
- Revenue Structure of Beijing Origin Water Technology by Product, 2011-2013
- Revenue Breakdown of Beijing Origin Water Technology by Region, 2011-2013

- Revenue Structure of Beijing Origin Water Technology by Region, 2011-2013
- Gross Margin of Primary Products of Beijing Origin Water Technology, 2011-2013
- Beijing Origin Water Technology's Revenue from Top 5 Clients and % of Total Revenue, 2011-2013
- Name List and Revenue Contribution of Beijing Origin Water Technology's Top 5 Clients, 2013H1
- Beijing Origin Water Technology's Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012
- Name List and Procurement of Beijing Origin Water Technology's Top 5 Suppliers, 2013H1
- Main R&D Projects of Beijing Origin Water Technology, 2013
- R&D Costs and % of Total Revenue of Beijing Origin Water Technology, 2010-2012
- Separating Membrane Products of Beijing Origin Water Technology
- Subsidiaries Involving in Separating Membrane Business under Beijing Origin Water Technology, 2012
- Revenue and Net Income of Beijing Origin Water Technology, 2012-2016E
- Revenue and Net Income of MOTIMO, 2009-2012
- Revenue and Net Income of MOTIMO, 2009-2013
- Revenue Breakdown of MOTIMO by Product, 2011-2013
- Revenue Structure of MOTIMO by Product, 2011-2013
- Revenue Breakdown of MOTIMO by Region, 2011-2013
- Revenue Structure of MOTIMO by Region, 2011-2013
- Gross Margin from Primary Business of MOTIMO, 2011-2013 MOTIMO's Revenue from Top 5 Clients and % of Total Revenue, 2011-2013
- Name List and Revenue Contribution of MOTIMO's Top 5 Clients, 2013H1
- MOTIMO's Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012
- Name List and Procurement of MOTIMO's Top 5 Suppliers, 2013H1
- Main R&D Projects of MOTIMO, 2013
- R&D Costs and % of Total Revenue of MOTIMO, 2011-2013
- Main Separating Membrane Products of MOTIMO
- Revenue and Net Income of MOTIMO, 2012-2016E

- Revenue and Net Income of South Huiton, 2009-2013
- Revenue Breakdown of South Huiton by Product, 2011-2013
- Revenue Structure of South Huiton by Product, 2011-2013
- Revenue Breakdown of South Huiton by Region, 2011-2013
- Revenue Structure of South Huiton by Region, 2011-2013
- Gross Margin of Hit Products of South Huiton, 2011-2013
- South Huiton's Revenue from Top 5 Clients and % of Total Revenue, 2011-2013
- Name List and Revenue Contribution of Top 5 Clients of South Huiton, 2013H1
- South Huiton's Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012
- Name List and Procurement of South Huiton's Top 5 Suppliers, 2012
- Reverse Osmosis Membrane Products of Vontron Technology
- Total Assets and Net Income of Vontron Technology, 2009-2013
- Revenue and Net Income of South Huiton, 2012-2016E
- Separating Membrane Products of LITREE
- Separating Membrane Products of Eurofilm
- Application Cases of Separating Membrane Products Made by Hangzhou Water Treatment Technology Development Center
- Primary Businesses of Suntar
- Membrane Separation Technologies and Application Fields of Suntar
- Primary Businesses and Related Products of Jilin Jinsai
- Separating Membrane Products and Equipments of Zhaojin Motian
- Separating Membrane Business Comparison of Leading Industrial Players Worldwide, 2012
- Global Separating Membrane Products Market Scale, 2012-2016E
- China Separating Membrane Products Market Scale, 2012-2016E
- China Separating Membrane Products Market Scale and % in Global Market, 2012-2016E
- China Separating Membrane Market Size, 2016E

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

Choose type of format

- PDF (Single user license)2,200 USD
- Hard copy 2,300 USD
- PDF (Enterprisewide license)..... 3,400 USD

※ Reports will be dispatched immediately once full payment has been received.
Payment may be made by wire transfer or credit card via PayPal.

About ResearchInChina

ResearchInChina (www.researchinchina.com) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

Our Major Activities

- *Multi-users market reports*
- *Database-RICDB*
- *Custom Research*
- *Company Search*

RICDB (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at www.researchinchina.com

For any problems, please contact our service team at: