



China SCR Denitration Catalyst Industry Report, 2013-2016

Jan. 2014

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

With the rapid development of China's economy and the escalation of industrialization level, the air pollution is getting worse. Nitrogen oxide emissions in China grew to 23.378 million tons in 2012, surpassing the United States to be the world's largest emitter of nitrogen oxide.

Following desulfurization, flue gas denitration has become another priority for China.

Flue gas denitration policies are oriented for coal-fired power plants. By the end of 2012, China's power installed capacity had hit 1.14 billion kilowatts, 820 million kilowatts or 72% of which belonged to thermal power installed capacity. Thermal power generation consumes 1.6 billion tons of coal annually, which creates 9.95 million tons of nitrogen oxide, accounting for 43% of the total emissions of nitrogen oxide. In view of this, the government has forced the existing thermal power plants and the ones under construction to install denitration facilities.

In the mainstream denitration technology -- SCR Denitration, the crucial catalyst costs 40% of the entire cost of denitration renovation .

By the end of 2012, the cumulative installed denitration capacity had reached 230 million kilowatts, only equivalent to 28% of the thermal power installed capacity. The denitration device gap amounts to 590

million kilowatts. In the next 2-3 years, the peak of denitration engineering construction will emerge, and the demand for SCR denitration catalyst will exceed the supply.

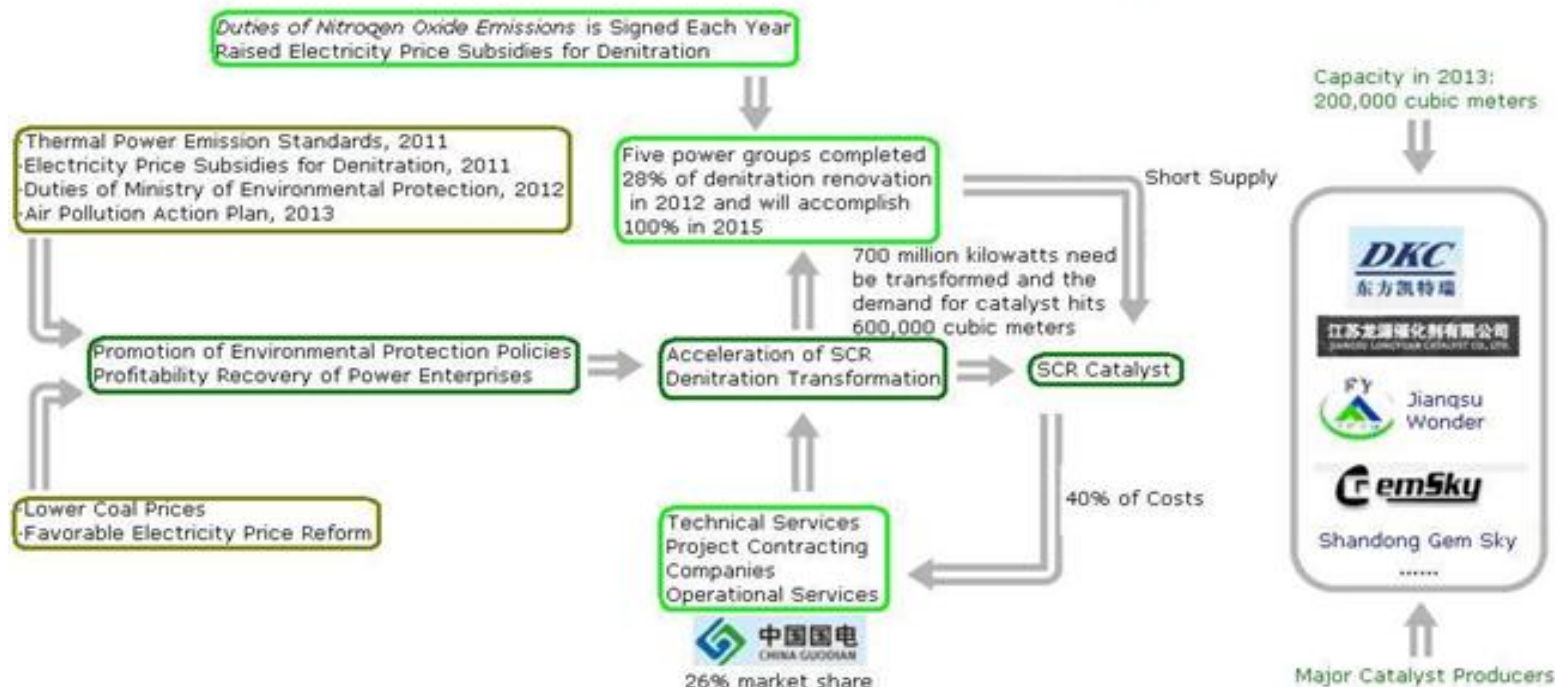
At the end of 2012, China's SCR denitration catalyst capacity totaled 150,000 m3, whilst the domestic demand was only 97,000 m3. In 2013, the actual capacity of SCR denitration catalyst expanded to 200,000 m3, but the actual demand reached 251,000 m3 thanks to the denitration construction peak.

Almost all of major Chinese producers of SCR denitration catalyst introduce foreign production technology, and the catalyst price remains at a high level. Dongfang Boiler imports the technology from Germany KWH, and gained the capacity of 15,000 m3 in 2012. Yuanda's technology stems from the U.S. ComreTech, with the capacity of 12,000 m3 in 2012. Datang Nanjing Environmental Protection Technology adopts the technology of the British Johnson Matthey, with the capacity of 10,000 m3 in 2012 and the expected capacity of 30,000 m3 in 2016.

The report covers the followings:

- ✘ Status quo, competition pattern, supply & demand and development prediction of Chinese SCR denitration catalyst;
- ✘ Technical characteristics, trends and competitive landscape of Chinese denitration industry;
- ✘ Operation and denitration catalyst business of 15 key global and Chinese SCR denitration catalyst manufacturers (including Johnson Matthey, Yuanda, Dongfang KWH, etc.).

Chinese Thermal Power SCR Denitration and Catalyst Market



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