



# China Environmental Monitoring Instrument Industry Report, 2013-2015

Oct. 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

As industrialization and urbanization advances unceasingly in China, environmental issues are of the greatest concern to the public and environmental protection gradually turns into a national policy. Accordingly, environmental monitoring instrument as the basis of environmental protection has ushered in explosive development in recent years. Sales of environmental monitoring products in China surged from RMB1 billion in 2006 to RMB4.9 billion in 2013 at a CAGR of 25.5%, which indicates that China's environmental monitoring instrument industry enters a stage of rapid development.

According to The National 12th Five-Year Plan for Environmental Monitoring issued by China's Ministry of Environmental Protection in February 2012, the demand for environmental monitoring instruments during the 12th Five-year Plan period comes mainly from three areas: standardized construction of environmental monitoring stations of all levels, environmental quality monitoring and pollution source monitoring, whose demand will reach RMB1.7 billion, RMB6 billion and RMB18 billion respectively.

### Environmental Monitoring Instrument Market Demand Pulled by National 12th Five-Year Plan for Environmental Monitoring

Orientation	Details	Instrument	Estimated Demand
<b>Standardized Construction of Environmental Monitoring Stations of All Levels</b>	<ul style="list-style-type: none"> <li>County-level environmental monitoring stations will possess basic environmental monitoring capacity and their standardization construction attainment rate will increase by 20 percentage points over the figure at the end of the 11<sup>th</sup> Five-Year Plan period (2006-10);</li> <li>City-level monitoring will be basically standardized and province-level monitoring will all reach the standard.</li> </ul>	Field monitoring instrument, laboratory analytical instrument	About 570 stations will be newly added, totaling RMB1.7 billion.
<b>Environmental Quality Monitoring</b>	<ul style="list-style-type: none"> <li>City: adding PM2.5 and ozone monitoring;</li> <li>Key provincial capitals: adding VOC monitoring;</li> <li>Region: adding PM2.5 and ozone monitoring.</li> </ul>	PM2.5, ozone, VOC monitoring instrument	Air monitoring: RMB2-2.5 billion; surface water monitoring: RMB3-4.5 billion
<b>Pollution Source Monitoring</b>	<ul style="list-style-type: none"> <li>Coverage: polluting enterprises under key national supervision;</li> <li>Indicator: adding ammonia nitrogen and nitrogen oxide monitoring, strengthening waste water heavy metal monitoring, gradually conducting monitoring on exhaust gas heavy metal, coal-fired power plant mercury emission and metal smelting factory lead emission.</li> </ul>	Water quality and exhaust gas online monitoring instrument and laboratory analytical instrument	Waste water pollution source monitoring: RMB5.5-6.5 billion; exhaust gas pollution source monitoring: RMB12-13.5 billion

Source: The National 12th Five-Year Plan for Environmental Monitoring, ResearchInChina

From the perspective of competitive landscape, well-known foreign manufacturers such as HACH, SHIMADZU, Thermo Fisher Scientific, Waters, E+H, etc. give priority to sales of front-end and standardized analytical instrument; while domestic players including SDL, Sailhero, FPI, Universtar and the like are mainly occupied in back-end system integration and operation services.

With respect to enterprises, FPI boasts abundant production lines with business scope covering industrial process analysis, environmental monitoring, digital environmental protection, safety monitoring, laboratory instrument, etc., of which environmental monitoring products primarily cover pollution source monitoring, water quality monitoring and air quality monitoring. In 2013 FPI posted revenue of RMB941 million, of which RMB433 million or 46.2% was contributed by the environmental monitoring system.

Sailhero specializes in six product series consisting of five automatic continuous online monitoring systems (air, water quality, waste water COD, exhaust gas, acid rain) and environmental emergency monitoring vehicle. Among them, air monitoring is the company's strength, demonstrated by outstanding quantity of orders in 2013. Thanks to the significant revenue growth of air monitoring products, total revenue of Sailhero attained RMB335 million in 2013, 76.4% of which came from the aforementioned products.

China Environmental Monitoring Instrument Industry Report, 2013-2015 highlights the followings:

- Overview of China environmental monitoring instrument industry, including development course, policies and regulations, market size, trends, etc.;
- Market size, demand model, trends, etc. of major market segments such as environmental water monitoring, environmental gas detection, heavy metal testing;
- Profile, financial position, output & sales volume, major customers, featured projects, R&D, production base distribution, technical characteristics, etc. of 13 domestic companies such as Sailhero, FPI, Skyray, SDL, ECHO, Universtar, Tianhong, Molway, Chinatech Talroad, etc. and 6 foreign players named HACH, Agilent, Waters, SHIMADZU, Thermo Fisher Scientific and E+H.

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