



China Thermal Power Denitration Industry Report, 2014-2017

Jan. 2015

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 rapid economic development and enhanced industrialization in China, the air pollution is worsening, while environmental control measures become increasingly stringent. China has already turned to be the world's largest NOx emitter, and flue gas denitrification has become an important task following desulfurization. In 2013, the NOx emission went down 4.7% year on year to 22.274 million tons, thanks to denitration policies implemented by thermal power plants.

As of June 2014, China's installed generating capacity totaled 1.3 billion kilowatts, of which thermal power installed capacity reached 880 million kilowatts with a share of 67.7% which was lower than before. Thermal power consumes about 1.7 billion tons of coal each year, and discharged 8.8 million tons of NOx (accounting for 39.5% of the total NOx emission) in 2013. In view of this, the government has introduced compulsory measures to require all the existing thermal power plants and the ones under construction to install denitration equipment. Therefore, China's denitration construction will reach a peak during 2012-2015. In H1 2014, the new thermal power denitration units had 120 million kilowatts, and the installed denitration capacity amounted to 550 million kilowatts, equivalent to 62.5% of the total installed capacity of thermal power, showing huge potentials.

China Thermal Power Denitration and SCR Catalyst Market



Sources: China Thermal Denitration Industry Report, 2014-2017; ResearchInChina

As for the denitration project construction, GuodianLongyuan ranked first in the cumulative installed capacity which was put into operation in 2013, enjoying the largest share 21% and followed by China Huadian Engineering with 8% and Datang Technology with 7%. These enterprises are environmental protection companies subject to power generation groups. Given SCR denitration catalysts occupy 40% of the total denitration renovation costs and the future demand is great, a large number of enterprises are actively creating or expanding capacity herein.

In 2014, China's SCR denitration catalyst capacity exceeded 400,000 m³, of which 50,000 m³ / a and 40,000 m³ / a came from China's largest SCR denitration catalyst suppliers -- Tianhe Environmental Engineering and Datang Nanjing Environmental Protection respectively. Jiangsu Longyuan, Jiangsu Wonder and other companies had the respective capacity of about 20,000 m³ / a.

The report includes the following aspects:

- Status quo, competition pattern, supply & demand and development trends of China thermal power denitration industry,;
- Technical characteristics, competition pattern and development trends of China SCR denitration catalyst;
- Status quo, denitration business and prospects of 20 major Chinese thermal power denitration enterprises (CPI Yuanda, Wuxi Huaguang Boiler, Beijing SPC Environment Protection Tech, DKC, etc.).

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