



China SCR Denitration Catalyst Industry Report, 2016-2020

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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

Catalyst is the core of the SCR flue gas denitration technology, occupying about 40% of total cost of investments into SCR flue gas denitration system. During 2012-2014, the continuous denitration transformation of thermal power plants stimulated China's demand growth for SCR denitration catalyst, with the demand exceeding 250,000 cubic meters in 2014. However, the demand declined in 2015 as renovation work drew a close, then picked up in 2016, and is expected to see steady growth in the next few years, because:

First, China has put forward new standards for nitrogen oxide emissions of cement, glass, coke, diesel vehicle and other industries since 2015, which will give a new impetus to the growth of SCR denitration catalyst. Second, SCR denitration catalyst has a service life of 3-5 years in general, which means that the denitration catalyst installed since 2011 has to be updated. It is estimated that 270,000 cubic meters of SCR denitration catalyst require replacing by 2020, which will further boost the demand for denitration catalyst.

SCR denitration catalyst is divided into cellular, plate and corrugated types, of which the former two ones prevail in the current Chinese market, while the latter is rare. Based on demand, cellular SCR denitration catalyst held a market share of 64.4% in 2015, marking a dominant position. However, most companies prefer plate-type denitration catalyst which is more suitable for China's common medium and high-ash-content coal-fired conditions when the existing cellular SCR denitration catalyst expires. Therefore, the plate-type denitration catalyst will see a conspicuously growing market share in the next few years and stand at 43.9% or so by 2020.

With the people's more attention to the atmospheric environment in recent years, China has proposed more stringent requirements on management and use of denitration catalyst, and in August 2014 included waste gas denitration catalyst (vanadium and titanium-based) into hazardous waste, which opens up the potential market for disposal of waste gas denitration catalyst and provides more market opportunities for the promotion and application of new-type efficient non-toxic denitration catalyst. At present, Gemsky has developed non-toxic rare earth denitration catalyst.

With the increasing demand for flue gas denitration in China, SCR denitration catalyst enterprises have been expanding in scale. In 2016, there were more than 10 SCR denitration catalyst producers each with annual capacity of over 20,000 cubic meters in China; 3 enterprises had the annual capacity of over 50,000 cubic meters apiece, occupying one-third of the total capacity cumulatively.

The report highlights the following:

- ◆ China's current atmospheric governance, denitration catalyst policy and technology environment;
- ◆ China's SCR denitration catalyst capacity, output, demand and structure, price trend, corporate competition, denitration catalyst regeneration market and potentials, etc.;
- ◆ China's titanium dioxide (an upstream raw material of SCR denitration catalyst) supply, demand and price trend; status quo of downstream thermal power denitration installation, cement, glass, coke, diesel vehicles and the like;
- ◆ Operation and SCR denitration catalyst business of 6 global and 15 Chinese key SCR denitration catalyst manufacturers.

Market Share of Major SCR Denitration Catalyst Companies in China by Capacity, 2016



Source: ResearchInChina

1 Overview of SCR Denitration Catalyst

- 1.1 Introduction
 - 1.1.1 SCR Denitration Catalyst
 - 1.1.2 SCR Denitration Principle
 - 1.1.3 SCR Denitration Process
- 1.2 Industry Chain

2 Development Environment of SCR Denitration Catalyst in China

- 2.1 Policy
- 2.2 Technology
 - 2.2.1 Denitration Technology
 - 2.2.2 Denitration Catalyst Regeneration Technology
- 2.3 Current Air Pollution Control
 - 2.3.1 Nitrogen Oxide (NOx) Emission
 - 2.3.2 Environmental Protection Investment

3 Status Quo of SCR Denitration Catalyst in China

- 3.1 Overview
- 3.2 Market Supply and Demand
 - 3.2.1 Supply
 - 3.2.2 Demand
- 3.3 Price Trend
- 3.4 Competitive Landscape
 - 3.4.1 Corporate Competition
 - 3.4.2 Regional Competition
- 3.5 SCR Catalyst Regeneration
 - 3.5.1 Market Situation

- 3.5.2 Potential Scale

4 Upstream and Downstream of SCR Denitration Catalyst in China

- 4.1 Upstream
 - 4.1.1 Overview
 - 4.1.2 Titanium Dioxide
- 4.2 Downstream
 - 4.2.1 Thermal Power
 - 4.2.2 Cement
 - 4.2.3 Glass
 - 4.2.4 Coking
 - 4.2.5 Diesel Vehicles

5 Key Global Denitration Catalyst Manufacturers

- 5.1 Nippon Shokubai
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Catalyst Business
- 5.2 Johnson Matthey
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Catalyst Business
- 5.3 HaldorTopsoe
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Business in China
- 5.4 Cornetech

- 5.5 HITACHI
- 5.6 CoaLogix

6 Key Chinese Denitration Catalyst Manufacturers

- 6.1 Tianhe (Baoding) Environmental Engineering Co., Ltd.
 - 6.1.1 Profile
 - 6.1.2 SCR Denitration Catalyst Business
- 6.2 Jiangsu Fengye Technical Environment Group Co., Ltd
 - 6.2.1 Profile
 - 6.2.1 SCR Denitration Catalyst Business
- 6.3 Datang Environmental Industry Group Co., Ltd
 - 6.3.1 Profile
 - 6.3.2 Operation
 - 6.3.3 SCR Denitration Catalyst Business
- 6.4 Tuna Corporation
 - 6.4.1 Profile
 - 6.4.2 Operation
 - 6.4.3 SCR Denitration Catalyst Business
- 6.5 Beijing GuodianLongyuan Environmental Engineering Co., Ltd
 - 6.5.1 Profile
 - 6.5.2 SCR Denitration Catalyst Business
- 6.6 State Power Investment Corporation Yuanda Environmental Protection Co., Ltd
 - 6.6.1 Profile
 - 6.6.2 Operation
 - 6.6.3 SCR Denitration Catalyst Business

6.7 China Huadian Engineering Co., Ltd
6.7.1 Profile
6.7.2 SCR Denitration Catalyst Business
6.8 Shanxi Tongmei Electric Power Environmental Protection Technology Co., Ltd
6.8.1 Profile
6.8.2 SCR Denitration Catalyst Business
6.9 Beijing Denox Environment & Technology Co., Ltd.
6.9.1 Profile
6.9.2 Operation
6.9.3 SCR Denitration Catalyst Business
6.10 Fujian Longking Co., Ltd.
6.10.1 Profile
6.10.2 Operation
6.10.3 SCR Denitration Catalyst Business
6.11 JYT Corporation
6.11.1 Profile
6.11.2 Operation
6.11.3 Non-toxic Denitration Catalyst Business
6.12 Xi'an Qiyuan Mechanical and Electrical Equipment Co., Ltd.
6.12.1 Profile
6.12.2 Operation
6.12.3 SCR Denitration Catalyst Business
6.13 Chengdu Dongfang KWH Environmental Protection Catalysts Co., Ltd. (DKC)
6.14 Zhejiang Hailiang Environmental Materials Co., Ltd.
6.15 Shandong Hongchuang Environmental Protection Co., Ltd.

6.16 Wuxi Huaguang New Power Environmental Protection Technology Co., Ltd. (under Wuxi Huaguang Boiler Co., Ltd.)

7 Summary and Forecast

7.1 Summary
7.1.1 Market
7.1.2 Enterprises
7.2 Trend Forecast

- 
- Cellular, Plate-type and Corrugated Catalyst
 - Working Principle of SCR Denitration
 - SCR Denitration Process of Typical Thermal Power Plant
 - SCR Denitration Catalyst Industry Chain
 - Policies on SCR Denitration Catalyst Industry in China, 2011-2016
 - Classification of Denitration Technologies
 - Technology Sources of Major SCR Denitration Catalyst Enterprises in China
 - Before and After SCR Catalyst Regeneration
 - SCR Catalyst Regeneration Methods
 - China's NOx Emissions, 2010-2020E
 - China's NOx Emission Sources, 2013-2016
 - Proportion of NOx Emissions (by Sector), 2016
 - China's Total Investment in Environmental Pollution Control and % of GDP, 2010-2016
 - China's Air Pollution Control Industry Scale, 2010-2020E
 - Additional and Transformation Scale of Chinese Desulfurization and Denitration Market, 2010-2020E
 - Development Course of China's Denitration Industry
 - China's SCR Denitration Catalyst Market Size, 2010-2020E
 - China's SCR Denitration Catalyst Capacity, 2010-2017
 - China's SCR Denitration Catalyst Output, 2010-2017
 - China's Demand for SCR Denitration Catalyst, 2010-2020E
 - China's Demand for SCR Denitration Catalyst (by Source), 2010-2020E
 - China's Demand for SCR Denitration Catalyst (by Product), 2010-2020E
 - Average Price of SCR Denitration Catalyst in China, 2011-2017
 - Price of Plate-type SCR Denitration Catalyst in China, 2011-2017
 - Global Major SCR Denitration Catalyst Enterprises and Technologies

Selected Charts

- Capacity of Major SCR Catalyst Producers in China, 2016
- Major Cellular SCR Denitration Catalyst Enterprises and Their Capacity in China, 2016
- Major Plate-type SCR Denitration Catalyst Enterprises and Their Capacity in China, 2016
- Number of SCR Catalyst Enterprises in China (by Region), 2016
- SCR Denitration Catalyst Regeneration Manufacturers and Their Capacity in China, 2016
- Raw Materials of Denitration Catalyst
- China's Titanium Dioxide Output and YoY Growth, 2010-2020E
- Competitive Landscape of Global Major Manufacturers in Titanium Dioxide Market, 2017
- Price Trend of Titanium Dioxide in China, 2010-2017
- Capacity of Flue Gas Denitration Units Put into Operation by Thermal Power Plants in China, 2011-2016
- China's Thermal Power Installed Capacity, 2011-2020E
- Capacity of China's Thermal Power SCR Denitration Units, 2013-2016
- Capacity of Flue Gas Denitration Units Put into Operation by Thermal Power Plants, 2015
- Accumulative Capacity of Flue Gas Denitration Units Put into Operation by Thermal Power Plants, by the end of 2015
- Capacity of Flue Gas Denitration Units Signed by Thermal Power Plants, 2015
- Cement Kiln Denitration Process Chart
- China's Cement Output, 2010-2017
- Glass Kiln Denitration Process Chart
- Coking Flue Gas Desulfurization and Denitration Integration Process
- Demand of Chinese Vehicles for Denitration Catalyst, 2013-2020E
- Business Structure of Nippon Shokubai
- Net Revenue and Net Income of Nippon Shokubai, FY2010-FY2016
- Revenue (by Division) of Nippon Shokubai, FY2012-FY2016
- Catalyst Products of Nippon Shokubai
- Business Structure of Nippon Shokubai, FY2015

Selected Charts

- Global Business Distribution of Nippon Shokubai, FY2015
- Global Business Distribution of Johnson Matthey
- Revenue and Net Income of Johnson Matthey, FY2013- FY2017
- Revenue of Johnson Matthey (by Business), FY2014- FY2017
- Catalyst Products of Johnson Matthey
- Branches of Johnson Matthey in China and Their Business Scope
- Global Business Distribution of Topsoe
- Revenue and Net Income of HaldorTopsoe, 2012-2016
- Revenue of HaldorTopsoe (by Business), 2014-2015
- Major Subsidiaries of Tianhe Environmental Engineering
- SCR Denitration Catalyst Production Bases and Capacity of Tianhe Environmental Engineering, 2016
- Technical Characteristics of Fengye's SCR Denitration Catalyst
- Fengye's SCR Denitration Catalyst Production Bases and Capacity, 2016
- Development History of Datang Environmental Industry
- Revenue and Gross Margin of Datang Environmental Industry, 2013-2016
- Operating Revenue of Datang Environmental Industry (by Business), 2013-2016
- Denitration Catalyst Capacity and Output of Datang Environmental Industry, 2013-2016
- Denitration Catalyst Deliveries of Datang Environmental Industry, 2013-2016
- Average Selling Price of Denitration Catalyst of Datang Environmental Industry, 2013-2016
- Tuna's Major Economic Indicators, 2013-2016
- Tuna's Operating Revenue Structure (by Business), 2013-2016
- Tuna's Fund-raising Construction Projects
- Tuna's Denitration Catalyst Revenue and Gross Margin, 2013-2016
- Tuna's Denitration Catalyst Sales Volume and Price, 2013-2016
- Tuna's Revenue from Top 5 Denitration Catalyst Clients and % of Total Revenue, 2014-2016

- 
- SCR Catalyst Capacity of Jiangsu Longyuan, 2011-2016
 - Revenue and Net Income of Yuanda Environmental Protection, 2011-2016
 - Operating Revenue of Yuanda Environmental Protection (by Business), 2015-2016
 - Denitration Catalyst Output and Sales Volume of Yuanda Environmental Protection, 2014-2016
 - Denitration Catalyst Product Specifications of Yuanda Environmental Protection
 - Major Subsidiaries of SPIC Yuanda Environmental Protection Catalyst Co., Ltd.
 - Denox's Revenue and Net Income, 2012-2016
 - Denox's SCR Denitration Catalyst Capacity, 2013-2016
 - Denox's SCR Denitration Catalyst Sales Volume and Price, 2012-2016
 - Revenue and Net Income of Fujian Longking, 2011-2016
 - Operating Revenue and Gross Margin of Fujian Longking (by Business), 2014-2016
 - Major Economic Indicators of Fujian Longking, 2015-2016
 - JYT's Revenue and Net Income, 2011-2016
 - JYT's Four Major Businesses
 - JYT's Operating Revenue and Gross Margin (by Business), 2015-2016
 - Major Economic Indicators of JYT's Non-toxic Denitration Catalyst, 2014-2016
 - Operating Revenue and Gross Margin of Qiyuan Mechanical and Electrical Equipment (by Business), 2013-2016
 - Market Share of Major SCR Denitration Catalyst Companies in China, 2016
 - China's SCR Denitration Catalyst Market Structure, 2015-2020E

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