

China SCR Denitration Catalyst Industry Report, 2013-2016

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Abstracts

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.).

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