

Global and China High Performance Membrane Material Industry Report, 2012

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Abstracts

High-performance membrane material is listed as one of the top 10 special projects in the 12th Five-Year Development Plan for New Materials Industry released by the Ministry of Industry and Information Technology in 2012, according to which, the independent production of water treatment membrane, battery separator and optical polyester film should be realized by 2015 to enhance self-sufficiency rate of these products. However, water treatment membrane, optical film and lithium battery separator are still in their infancy in China and are expected to witness a boom driven by the twin engines of policies and market demand.

1. Water Treatment Membrane

Water treatment membrane, a kind of material featuring selective separation function, mainly consists of microfiltration membrane, ultrafiltration membrane, nanofiltration membrane and reverse osmosis membrane, and finds application in such fields as desalination of sea water and urban sewage treatment. In 2011, the market size of global membrane component approximated USD10.8 billion, of which the market size in China reached roughly RMB10 billion, comprising around 15% of the global total.

Only a few enterprises are capable of carrying out independent R&D and intensive production of membrane and membrane component, and European-American and Japanese companies are the leading players. Hydranautics, Dow Chemical and Toray are the world's leading manufacturers of reverse osmosis membrane and nanofiltration membrane, and Veolia and Siemens are the global leading producers of microfiltration membrane and ultrafiltration membrane.

China can rival with the world in research into micro/ultrafiltration membrane, and home-

grown products make up more than 60% market share, with Beijing Origin Water Technology and Tianjin Motimo Membrane Technology serving as major producers. Though they have achieved localization of reverse osmosis membrane and nanofiltration membrane, Chinese companies still lag far behind foreign counterparts in technology. The domestic market is still occupied by such foreign giants as Hydranautics and Dow Chemical.

2. Optical Film

Optical films, which include reflecting film, antireflection film, polarizing film, brightness enhancement film, window film and so forth, are principally applied in LCD industry and partly in automotive glass and building windows. The global shipment of LCD panels totaled 112 million square meters in 2011, and Chinese Mainland has become the largest consumer of LCD panel worldwide. As the global LCD panel capacity keeps being transferred to Mainland China, the demand for optical films will balloon as well.

The optical film industry which supports LCD panel is relatively underdeveloped in China. In recent years, a small number of domestic enterprises have made technical breakthroughs in optical film and possessed intensive production capacity, but they can only produce medium and low-end products and still have a long way to go in high-end membrane area. Ningbo Exciton New Material Technology is the most typical one and has realized mass-production of reflection membrane and diffusion film.

3. Lithium Battery Separator

The global lithium battery separator industry features a high concentration degree, and the top three companies, namely, Asahi Kasei, Polypore and Tonen, together hold a market share of over 60%. The leading Chinese manufacturers of lithium battery separator include Shenzhen Senior Technology Material Co., Ltd. and Jinhui Hi-tech which boasted annual lithium battery separator capacity of 90 million m² and 65 million m² respectively in 2011.

The report highlights the followings:

Overview of high-performance membrane and related policies in National 12th Five-Year Plan(2011-2015);

Market size, product mix, competitive landscape and development trends of global and Chinese water treatment membrane industry;

Market size, competition pattern and otherwise of optical film industry in China and beyond;

Market scale, competition structure and projects planned and under construction of global and Chinese lithium battery separator industry;

Operation, membrane material business and development of 10 high-performance membrane material manufacturers both at home and abroad.

Contents

1. OVERVIEW OF HIGH-PERFORMANCE MEMBRANE MATERIAL

- 1.1 Definition and Classification
- 1.2 Related Policies in China's 12th Five-Year Plan (2011-2015)

2. WATER TREATMENT MEMBRANE MARKET

- 2.1 Overview
- 2.2 Global Market
- 2.3 Chinese Market
 - 2.3.1 Policy
 - 2.3.2 Market Size
- 2.4 Competitive Landscape
- 2.5 Development Tendency

3. OPTICAL FILM MARKET

- 3.1 Overview
- 3.2 Global Market
- 3.3 Chinese Market
- 3.4 Competitive Landscape

4. LITHIUM BATTERY SEPARATOR MARKET

- 4.1 Overview
- 4.2 Global Market
 - 4.3.1 Market Size
 - 4.3.2 Competitive Landscape
- 4.3 Chinese Market
 - 4.3.1 Policy
 - 4.3.2 Status Quo

5. GLOBAL KEY MANUFACTURERS

- 5.1 Toray
 - 5.1.1 Profile
 - 5.1.2 Operation

- 5.1.3 Revenue Structure
- 5.1.4 Membrane Material Business
- 5.1.5 Business in China
- 5.2 Asahi Kasei
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Revenue Structure
 - 5.2.4 Membrane Material Business
- 5.3 Nitto Denko
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Revenue Structure
 - 5.3.4 Business in China
 - 5.3.5 Hydranautics

6. MAJOR CHINESE MANUFACTURERS

- 6.1 Beijing Origin Water
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Revenue Structure
 - 6.1.4 Gross Margin
 - 6.1.5 Clients and Suppliers
 - 6.1.6 R&D
 - 6.1.7 Membrane Material Business
- 6.2 Tianjin Motimo Membrane
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Revenue Structure
 - 6.2.4 Gross Margin
 - 6.2.5 Clients and Suppliers
 - 6.2.6 R & D
 - 6.2.7 Raw Materials
 - 6.2.8 Membrane Material Business
- 6.3 South Huiton
 - 6.3.1 Profile
 - 6.3.2 Operation
 - 6.3.3 Revenue Structure
 - 6.3.4 Gross Margin

- 6.3.5 Clients and Suppliers
- 6.3.6 Membrane Material Business
- 6.4 Jiangsu Yuxing
 - 6.4.1 Profile
 - 6.4.2 Operation
 - 6.4.3 Revenue Structure
 - 6.4.4 Gross Margin
 - 6.4.5 Clients and Suppliers
 - 6.4.6 R & D
 - 6.4.7 Output and Sales Volume
 - 6.4.8 Raw Materials
 - 6.4.9 Membrane Material Business
- 6.5 Sichuan EM Technology
 - 6.5.1 Profile
 - 6.5.2 Operation
 - 6.5.3 Revenue Structure
 - 6.5.4 Gross Margin
 - 6.4.5 Clients and Suppliers
 - 6.5.6 Membrane Material Business
- 6.6 FSPG Hi-Tech
 - 6.6.1 Profile
 - 6.6.2 Operation
 - 6.6.3 Revenue Structure
 - 6.6.4 Gross Margin
 - 6.6.5 Membrane Material Business
- 6.7 Cangzhou Mingzhu Plastic
 - 6.7.1 Profile
 - 6.7.2 Operation
 - 6.7.3 Revenue Structure
 - 6.7.4 Gross Margin
 - 6.7.5 Clients and Suppliers
 - 6.7.6 R & D
 - 6.7.7 Membrane Material Business

Selected Charts

SELECTED CHARTS

Classification and Application of Membrane Materials

Top 7 Strategic Emerging Industries and Related High Performance Membrane Material Products in China, 2012

Main Water Treatment Membrane Technologies

Global Market Size of Membrane Component, 2006-2011

Product Mix of Global Membrane Component Market, 2011

Policies Concerning Water Treatment Field in China, 2011-2015E

Market Size of Water Treatment Segments in China, 2011

Product Mix of Chinese Membrane Component Market, 2011

Competition Structure of Global and Chinese Water Treatment Membrane Market, 2011

Classification and Application of Optical Films

Global Demand for TFT-LCD, 2009-2012E

Global Market Size of Optical Film for Backlight Module, 2008-2011

Chinese LCD Panel Capacity and % of Global Total Capacity, 2009-2011

Major Manufacturers of Optical Film in China and in the World, 2011

Separator Consumption in Different Lithium Batteries

Global Lithium Battery Market Size, 2009-2012E

Competitive Landscape of Global Lithium Battery Separator, 2011

Capacity and Projects Planned and under Construction of Main Lithium Battery Separator Manufacturers in China, 2011

Six Business Divisions and Major Products of Toray

Net Sales and Net Income of Toray, FY2007-FY2011

Net Sales Breakdown of Toray by Division, FY2009-FY2011

Net Sales Structure of Toray by Division, FY2009-FY2011

Main Affiliated Companies and Their Major Businesses of Asahi Kasei

Net Sales and Net Income of Asahi Kasei, FY2007-FY2011

Net Sales Breakdown of Asahi Kasei by Division, FY2009-FY2011

Net Sales Structure of Asahi Kasei by Division, FY2009-FY2011

Main Products and Applications of Nitto Denko

Sales and Net Income of Nitto Denko, FY2007-FY2011

Sales Breakdown of Nitto Denko by Product, FY2009-FY2011

Sales Structure of Nitto Denko by Product, FY2009-FY2011

Sales Breakdown of Nitto Denko by Region, FY2009-FY2011

Sales Structure of Nitto Denko by Region, FY2009-FY2011

Nitto Denko's Subsidiaries Engaging in High Performance Membrane Material in China

and Their Main Business

Separation Membrane Types and Main Products of Hydranautics

Revenue and Net Income of Beijing Origin Water, 2007-2011

Revenue Breakdown of Beijing Origin Water by Product, 2009-2011

Revenue Structure of Beijing Origin Water by Product, 2009-2011

Revenue Breakdown of Beijing Origin Water by Region, 2009-2011

Revenue Structure of Beijing Origin Water by Region, 2009-2011

Gross Margin of Main Products of Beijing Origin Water, 2009-2011

Beijing Origin Water's Revenue from Top 5 Clients and % of Total Revenue, 2009-2011

Name List and Revenue Contribution of Beijing Origin Water's Top 5 Clients, 2011

Beijing Origin Water's Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2011

Name List and Procurement Contribution of Beijing Origin Water's Top 5 Suppliers, 2011

Main R&D Projects of Beijing Origin Water, 2011

R&D Costs and % of Total Revenue of Beijing Origin Water, 2009-2011

Membrane Material Subsidiaries of Beijing Origin Water, 2011

Revenue and Net Income of Membrane Technology, 2009-2011

Revenue and Net Income of Tianjin Motimo Membrane, 2009-2011

Revenue Breakdown of Tianjin Motimo Membrane by Product, 2009-2011

Revenue Structure of Tianjin Motimo Membrane by Product, 2009-2011

Revenue Breakdown of Membrane Engineering Business of Tianjin Motimo Membrane by Region, 2009-2011

Revenue Structure of Membrane Engineering Business of Tianjin Motimo Membrane by Region, 2009-2011

Gross Margin of Main Products of Tianjin Motimo Membrane, 2009-2011

Tianjin Motimo Membrane's Revenue from Top 5 Clients and % of Total Revenue, 2009-2011

Name List and Revenue Contribution of Tianjin Motimo Membrane's Top 5 Clients, 2011

Tianjin Motimo Membrane's Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2011

Name List and Procurement Contribution of Tianjin Motimo Membrane's Top 5 Suppliers, 2011

R&D Costs and % of Total Revenue of Tianjin Motimo Membrane, 2009-2011

Cost Structure of Main Raw Materials for Membrane Component of Tianjin Motimo Membrane, 2011

Average Price of Major Raw Materials for Tianjin Motimo Membrane's Membrane Component Business, 2009-2011

Capacity, Output and Operating Rate of Membrane Material of Tianjin Motimo Membrane, 2009-2011

Sales Volume and Sales-output Ratio of Membrane Material of Tianjin Motimo Membrane, 2009-2011

Revenue and Net Income of South Huiton, 2007-2011

Revenue Breakdown of South Huiton by Product, 2009-2011

Revenue Structure of South Huiton by Product, 2009-2011

Gross Margin of Main Products of South Huiton, 2009-2011

South Huiton's Revenue from Top 5 Clients and % of Total Revenue, 2009-2011

Name List and Revenue Contribution of South Huiton's Top 5 Clients, 2011

South Huiton's Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2011

Total Assets and Net Income of Guiyang Vontron, 2009-2011

Revenue and Net Income of Jiangsu Yuxing, 2007-2011

Revenue Breakdown of Jiangsu Yuxing by Product, 2009-2011

Revenue Structure of Jiangsu Yuxing by Product, 2009-2011

Revenue Breakdown of Jiangsu Yuxing by Region, 2009-2011

Revenue Structure of Jiangsu Yuxing by Region, 2009-2011

Gross Margin of Major Products of Jiangsu Yuxing, 2009-2011

Jiangsu Yuxing's Revenue from Top 5 Clients and % of Total Revenue, 2009-2011

Name List and Revenue Contribution of Jiangsu Yuxing's Top 5 Clients, 2011

Jiangsu Yuxing's Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2011

Name List and Procurement Contribution of Jiangsu Yuxing's Top 5 Suppliers, 2011

R&D Costs and % of Total Revenue of Jiangsu Yuxing, 2009-2011

Capacity, Output and Operating Rate of Major Products of Jiangsu Yuxing, 2009-2011

Output Structure of Jiangsu Yuxing's Main Membrane Products, 2011

Sales Volume and Sales-Output Ratio of Jiangsu Yuxing's Main Products, 2009-2011

Average Selling Price of Jiangsu Yuxing's Main Products, 2009-2011

Cost Structure of Major Raw Materials of Jiangsu Yuxing, 2011

Average Price of Major Raw Materials of Jiangsu Yuxing, 2009-2011

Output, Sales Volume and Sales-output Ratio of Solar Battery Back Sheet of Jiangsu Yuxing, 2009-2011

Output, Sales Volume and Sales-output Ratio of Optical Film of Jiangsu Yuxing, 2009-2011

Revenue and Net Income of Sichuan EM Technology, 2008-2011

Revenue Breakdown of Sichuan EM Technology by Product, 2009-2011

Revenue Structure of Sichuan EM Technology by Product, 2009-2011

Revenue Breakdown of Sichuan EM Technology by Region, 2009-2011

Revenue Structure of Sichuan EM Technology by Region, 2009-2011

Gross Margin of Major Products of Sichuan EM Technology, 2009-2011

Sichuan EM Technology's Revenue from Top 5 Clients and % of Total Revenue, 2009-2011

Name List and Revenue Contribution of Sichuan EM Technology's Top 5 Clients, 2011

Sichuan EM Technology's Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2011

Name List and Procurement Contribution of Sichuan EM Technology's Top 5 Suppliers, 2011

BOPET Capacity of Sichuan EM Technology, 2008-2011

Output, Sales Volume and Sales-output Ratio of Sichuan EM Technology's BOPET, 2010-2011

Revenue and Net Income of FSPG Hi-Tech, 2007-2011

Revenue Breakdown of FSPG Hi-Tech by Product, 2010-2011

Revenue Structure of FSPG Hi-Tech by Business, 2010-2011

Revenue Breakdown of FSPG Hi-Tech by Region, 2009-2011

Revenue Structure of FSPG Hi-Tech by Region, 2009-2011

Gross Margin of FSPG Hi-Tech's Major Products, 2011

Operating Revenue and Net Income of Jinhui Hi-tech, 2009-2011

Total Assets and Net Income of WINDA Opto-Electronic, 2009-2011

Operating Revenue and Net Income of DuPont Teijin Films, 2009-2011

Revenue and Net Income of Cangzhou Mingzhu, 2007-2011

Revenue Breakdown of Cangzhou Mingzhou by Product, 2009-2011

Revenue Structure of Cangzhou Mingzhu by Business, 2009-2011

Revenue Breakdown of Cangzhou Mingzhou by Region, 2009-2011

Revenue Structure of Cangzhou Mingzhou by Region, 2009-2011

Gross Margin of Major Products of Cangzhou Mingzhu, 2009-2011

Cangzhou Mingzhu's Revenue from Top 5 Clients and % of Total Revenue, 2009-2011

Name List and Revenue Contribution of Cangzhou Mingzhu's Top 5 Clients, 2011

Cangzhou Mingzhu's Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2011

R&D Costs and % of Total Revenue of Cangzhou Mingzhu, 2009-2011

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