

Global and China Separating Membrane Industry Report, 2013-2016

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Abstracts

Separating membrane is a kind of thin-layer substance with selective penetration function. It is for the use of concentration, separation and purification, and is widely applied in the sectors such as environment, energy, chemical, electronics, pharmaceuticals and food.

In 2012, the global market scale of separating membrane products approached USD12 billion, of which, the market size of reverse osmosis membrane (including nanofiltration membrane), micro-filtration membrane and ultrafiltration membrane stood at around 95%. Worldwide, industrial players from Japan and the United States play a more dominant role, cases including Toray Industries, Mitsubishi Rayon, Asahi Kasei Corporation in all professional in micro-filtration and ultrafiltration membrane fields, as well as Hydranautics, The Dow Chemical Company, and GE in reverse osmosis membrane/nanofiltration membrane arenas.

China separating membrane market has witnessed robust development with the growth pace keeping at 20%-30% in last ten years, albeit as a later starter. In 2012, the size of China separating membrane products market approximated RMB12 billion, with the proportion worldwide soaring to 16.3%. It is projected that China separating membrane market will continue its growth rate by around 20% in the upcoming years and that the figure by 2016 will jump to roughly RMB25 billion.

An integrated membrane industrial system has taken shape in China, with major products covering reverse osmosis membrane, micro-filtration membrane and ultrafiltration membrane with the market scale making up around 92%. Other separating membrane products include electric-driven membrane, gas separation membrane, medical membrane, etc.

Reverse osmosis membrane features the widest application, with the domestic market being occupied by foreign companies. And Chinese industrial players represented by Vontron Technology and Hangzhou Water Treatment Technology Development Center hold only 15% market share.

China micro-filtration membrane and ultrafiltration membrane markets demonstrate the fiercest competition, with the market occupancy nationwide exceeding 60%. China has more than 100 micro-filtration membrane and ultrafiltration membrane manufacturers consisting of Beijing Origin Water Technology, MOTIMO, and LITREE. However, foreign counterparts, such as Toray Industries and Asahi Kasei Corporation, are still taking a dominant position in high-end fields such as ultrapure water for electronic industry use, electrophoresis paint recycling, pharmaceutical, and enzymic preparation fields.

Separating membrane is made from organic or inorganic materials. And inorganic materials are mainly ceramic and metal, while organic materials mainly refer to all kinds of chemical raw materials. For example, the reverse osmosis membrane is commonly made from aromatic polyamide, while micro-filtration membrane and ultrafiltration membrane is mainly made from PVDF, polysulfone, PES and PVC, etc. Presently, China has a small number of companies involving in the production of membrane raw materials. Coupled with unstable quality, China imports around 60% membrane raw material resin.

The report highlights:

Market Scale, Product Structure and Competition Pattern in Global Separating Membrane Industry;

Market Scale, Product Structure ,Competition Pattern, Membrane Materials, Development Objectives in China Separating Membrane Industry;

Market Scale, Competition Pattern, and Development Trend of China Water Treatment Membrane Industry;

Overview and Competition Pattern of Other Separating Membrane Markets in China;

Operation, Separating Membrane Business, Development Prediction of 15

Separating Membrane Producers in China and Beyond.

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