

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.

Contents

1. OVERVIEW OF THE SEPARATING MEMBRANCE INDUSTRY

- 1.1 Overview
- 1.2 Classification
- 1.3 Industrial Chain

2. GLOBAL SEPARATING MEMBRANCE MARKET

- 2.1 Market Scale
- 2.2 Product Structure
- 2.3 Competition Pattern

3. CHINA SEPARATING MEMBRANCE MARKET

- 3.1 Market Scale
- 3.2 Product Structure
- 3.3 Competition Pattern
- 3.4 Membrane Materials
- 3.5 Development Objective

4. CHINA SEPARATING MEMBRANCE MARKET SEGMENTS

- 4.1 Water Treatment Membrane
 - 4.1.1 Overview
 - 4.1.2 Policy
 - 4.1.3 Market Scale
 - 4.1.4 Competition Pattern
 - 4.1.5 Development Trend
- 4.2 Other Separating Membranes
 - 4.2.1 Electric-Driven Membrane
 - 4.2.2 Gas Separation Membrane
 - 4.2.3 Medical Membrane
 - 4.2.4 Others

5. MAJOR COMPANIES WORLDWIDE

- 5.1 Toray Industries, Inc

- 5.1.1 Profile
- 5.1.2 Operation
- 5.1.3 Separating Membrane Business
- 5.2 Asahi Kasei Corporation
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Separating Membrane Business
- 5.3 NITTO Denko Corporation
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Separating Membrane Business
- 5.4 Dow Chemical
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Separating Membrane Business
- 5.5 GE
 - 5.5.1 Profile
 - 5.5.2 Operation
 - 5.5.3 Separating Membrane Business

6. KEY CHINESE ENTERPRISES

- 6.1 Beijing Origin Water Technology
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Revenue Structure
 - 6.1.4 Gross Margin
 - 6.1.5 Clients & Suppliers
 - 6.1.6 R&D
 - 6.1.7 Separating Membrane Business
 - 6.1.8 Prediction & Outlook
- 6.2 MOTIMO Membrane Technology
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Revenue Structure
 - 6.2.4 Gross Margin
 - 6.2.5 Clients & Suppliers
 - 6.2.6 R&D
 - 6.2.7 Separating Membrane Business

- 6.2.8 Prediction & Outlook
- 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 & Suppliers
 - 6.3.6 Separating Membrane Business
 - 6.3.7 Prediction & Outlook
- 6.4 LITREE Purifying Technology
 - 6.4.1 Profile
 - 6.4.2 Separating Membrane Business
- 6.5 Eurofilm
 - 6.5.1 Profile
 - 6.5.2 Separating Membrane Business
- 6.6 Hangzhou Water Treatment Technology Development Center
 - 6.6.1 Profile
 - 6.6.2 Separating Membrane Business
- 6.7 Suntar
 - 6.7.1 Profile
 - 6.7.2 Separating Membrane Business
- 6.8 Jilin Jinsai Technology Development
 - 6.8.1 Profile
 - 6.8.2 Separating Membrane Business
- 6.9 Zhaojin Motian
 - 6.9.1 Profile
 - 6.9.2 Separating Membrane Business
- 6.10 Nanjing Jiusi
 - 6.10.1 Profile
 - 6.10.2 Subsidiaries

7. CONCLUSION & OUTLOOK

- 7.1 Conclusion
- 7.2 Outlook

Selected Charts

SELECTED CHARTS

Classification of Separating Membrane by Raw Material

Classification of Separating Membrane by Separating Mechanism

Separating Membrane Industry Chain

Market Scale and Growth Rate of Global Separating Membrane Product Industry, 2006-2013

Product Structure of Global Separating Membrane Products Market, 2012

Leading Enterprises in Global Separating Membrane Industry, 2013

Market Scale and Growth Rate of China Separating Membrane Product Industry, 2006-2013

% of China Separating Membrane Product Market Size in Global Total, 2006-2013

Product Structure of China Separating Membrane Products Market, 2012

Leading Enterprises in China Separating Membrane Industry, 2013

Water Treatment Membrane Products and Their Raw Materials of Major Industrial Players Worldwide, 2013

Development Objectives of China Separating Membrane Market Segments, 2015

Introduction to Water Treatment Membrane

Roadmap of Water Treatment Membrane Technology

Policies Concerning Water Treatment Fields in China, 2011-2015

Market Scale and YoY Growth of China Water Treatment Membrane Products Industry, 2006-2013

Overview of China Water Treatment Membrane Market Segments, 2012

Leading Chinese Water Treatment Membrane Enterprises and Their Capacities, 2012

Overview of China Electric-Driven Membrane Market, 2013

Leading Chinese Electric-Driven Membrane Enterprises and Their Products, 2013

Leading Chinese Gas Separation Membrane Enterprises and Their Product Applications, 2013

Major Chinese Hemodialyzer Producers and Their Primary Businesses, 2013

Leading Business Divisions under Toray Industries and Their Major Products

Net Sales and Net Income of Toray Industries, FY2009-FY2013

Sales (%) of Toray Industries by Business Division, FY2013

Net Sales and Operating Profit from Environment & Engineering Business Division of Toray Industries, FY2009-FY2013

Separating Membrane Products and Applications of Toray Industries

Primary Businesses of Leading 9 Subsidiaries under Asahi Kasei Corporation

Net Sales and Net Income of Asahi Kasei Corporation, FY2009-FY2013

Net Sales of Asahi Kasei Corporation by Business Division, FY2011-FY2013
Net Sales of Asahi Kasei Corporation by Business Division, FY2011-FY2013 (%)
Water Treatment Membrane Products of Asahi Kasei Corporation
Application of Water Treatment Membrane Products of Asahi Kasei Corporation in Special Separation Field
Major Products and Application of NITTO Denko Corporation
Sales and Net Income of NITTO Denko Corporation, FY2009-FY2013
Sales % of NITTO Denko Corporation by Product, FY2012-FY2013
Sales and Operating Profit of NITTO Denko Corporation Medical & Membrane Business Sector by Product, FY2012-FY2013
Main Separating Membrane Products and Application of NITTO Denko Corporation
Net Sales and Net Income of Dow Chemical, 2008-2012
Revenue Structure % of Dow Chemical by Business Division, 2012
Sales and EBITDA of Dow Chemical Coatings and Infrastructure Solutions, 2010-2012
Sales % of Dow Chemical Coatings and Infrastructure Solutions by Product, 2012
Leading 8 Industrial Groups and Primary Businesses of GE
Revenue and Net Income of GE, 2008-2012
Revenue Structure of GE by Business Division, 2012
Revenue and Profit from Power Generation & Water Treatment Business Division of GE, 2008-2012
Revenue and Net Income of Beijing Origin Water Technology, 2009-2013
Revenue Breakdown of Beijing Origin Water Technology by Product, 2011-2013
Revenue Structure of Beijing Origin Water Technology by Product, 2011-2013
Revenue Breakdown of Beijing Origin Water Technology by Region, 2011-2013
Revenue Structure of Beijing Origin Water Technology by Region, 2011-2013
Gross Margin of Primary Products of Beijing Origin Water Technology, 2011-2013
Beijing Origin Water Technology's Revenue from Top 5 Clients and % of Total Revenue, 2011-2013
Name List and Revenue Contribution of Beijing Origin Water Technology's Top 5 Clients, 2013H1
Beijing Origin Water Technology's Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012
Name List and Procurement of Beijing Origin Water Technology's Top 5 Suppliers, 2013H1
Main R&D Projects of Beijing Origin Water Technology, 2013
R&D Costs and % of Total Revenue of Beijing Origin Water Technology, 2010-2012
Separating Membrane Products of Beijing Origin Water Technology
Subsidiaries Involving in Separating Membrane Business under Beijing Origin Water Technology, 2012

Revenue and Net Income of Beijing Origin Water Technology, 2012-2016E
Revenue and Net Income of MOTIMO, 2009-2012
Revenue and Net Income of MOTIMO, 2009-2013
Revenue Breakdown of MOTIMO by Product, 2011-2013
Revenue Structure of MOTIMO by Product, 2011-2013
Revenue Breakdown of MOTIMO by Region, 2011-2013
Revenue Structure of MOTIMO by Region, 2011-2013
Gross Margin from Primary Business of MOTIMO, 2011-2013
MOTIMO's Revenue from Top 5 Clients and % of Total Revenue, 2011-2013
Name List and Revenue Contribution of MOTIMO's Top 5 Clients, 2013H1
MOTIMO's Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012
Name List and Procurement of MOTIMO's Top 5 Suppliers, 2013H1
Main R&D Projects of MOTIMO, 2013
R&D Costs and % of Total Revenue of MOTIMO, 2011-2013
Main Separating Membrane Products of MOTIMO
Revenue and Net Income of MOTIMO, 2012-2016E
Revenue and Net Income of South Huiton, 2009-2013
Revenue Breakdown of South Huiton by Product, 2011-2013
Revenue Structure of South Huiton by Product, 2011-2013
Revenue Breakdown of South Huiton by Region, 2011-2013
Revenue Structure of South Huiton by Region, 2011-2013
Gross Margin of Hit Products of South Huiton, 2011-2013
South Huiton's Revenue from Top 5 Clients and % of Total Revenue, 2011-2013
Name List and Revenue Contribution of Top 5 Clients of South Huiton, 2013H1
South Huiton's Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012
Name List and Procurement of South Huiton's Top 5 Suppliers, 2012
Reverse Osmosis Membrane Products of Vontron Technology
Total Assets and Net Income of Vontron Technology, 2009-2013
Revenue and Net Income of South Huiton, 2012-2016E
Separating Membrane Products of LITREE
Separating Membrane Products of Eurofilm
Application Cases of Separating Membrane Products Made by Hangzhou Water Treatment Technology Development Center
Primary Businesses of Suntar
Membrane Separation Technologies and Application Fields of Suntar
Primary Businesses and Related Products of Jilin Jinsai
Separating Membrane Products and Equipments of Zhaojin Motian
Separating Membrane Business Comparison of Leading Industrial Players Worldwide,

2012

Global Separating Membrane Products Market Scale, 2012-2016E

China Separating Membrane Products Market Scale, 2012-2016E

China Separating Membrane Products Market Scale and % in Global Market,
2012-2016E

China Separating Membrane Market Size, 2016E

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