



China Environmental Protection Equipment Industry Report, 2013-2015

Jan. 2014

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

Originated in 1973, China's environmental protection industry witnessed rapid development in the period of "Eleventh Five-Year" (1996-2010) and "Twelfth Five-Year" (2011-2015) after experiencing the initial phase in 1980s and the rudimentary development in 1990s. Bolstered by the national policy and market demand, the environmental protection equipment manufacturing performed well and maintained a steady growth rate and profit margin in 2012.

In 2012, the gross industrial output value and the sales output value of environmental protection equipment manufacturing (including environmental protection equipment manufacturing and environmental monitoring instrumentation manufacturing) enterprises hit RMB191.379 billion and RMB187.947 billion respectively, a year-on-year increase of 19.46% and 19.58% separately. The sales-output ratio turned to be 98.21%, ranking 45th.

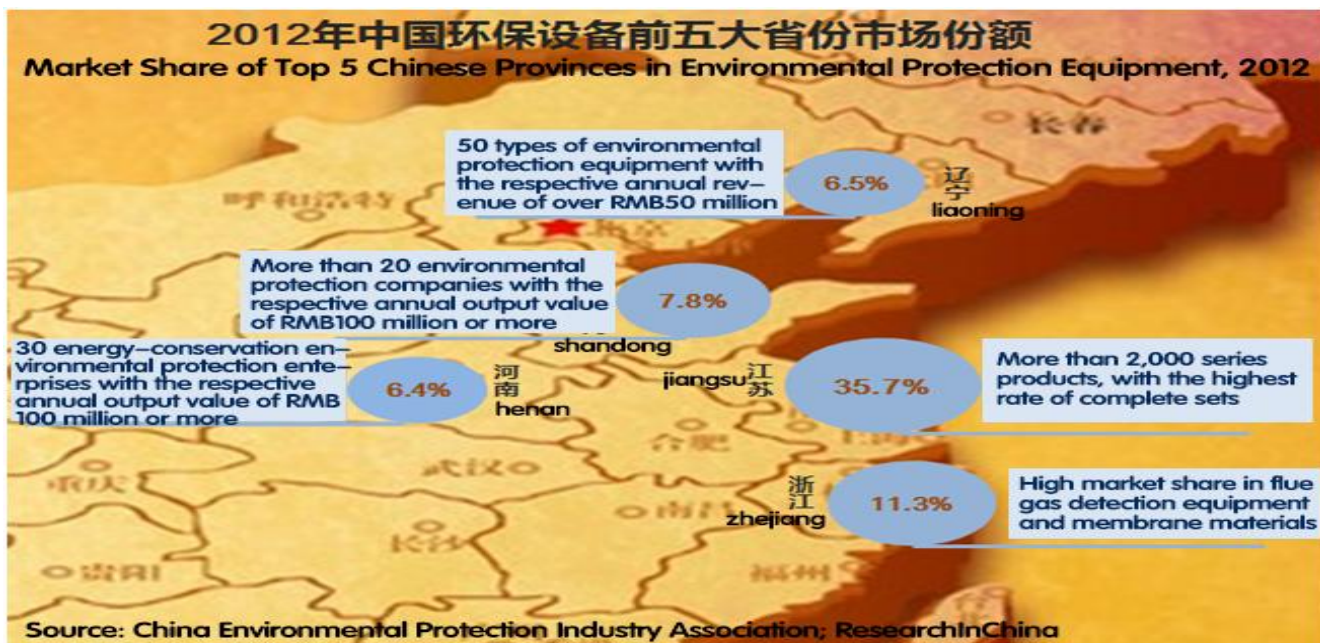
In 2012, the output of pollution control equipment increased by 36.2% year on year to 320,000 sets, containing 86,800 sets of water pollution control equipment (up 34.4% year on year), 107,100 sets of air pollution control equipment (up 25.8% year on year), 9,600 sets of solid waste treatment equipment (down 8.2% year on year), 1,186 sets of noise and vibration control equipment (down 5.6% year on year).

According to China Environmental Protection Industry Association, the total size of the dust removal industry approximated RMB14.3 billion in 2012. Chinese dedusting equipment manufacturers mainly embrace Longking Environmental Protection, Feida Environmental Science & Technology and Kelin Environmental Protection Equipment. Three of them gained the combined revenue of RMB6.28 billion in 2012, accounting for 43.9% of the total. In particular, Longking Environmental Protection achieved the revenue of RMB4.24 billion, sweeping 29.7%, far more than the other two companies

In point of downstream customers, Longking Environmental Protection covers a wider scope, earned RMB1.6 billion in the thermal power industry, RMB150 million in the iron and steel industry and RMB500 million in the cement industry in 2011. Feida Environmental Science & Technology mainly embarks on the thermal power industry with the revenue of RMB1 billion, while it is rarely involved in iron, steel and cement industries. Kelin Environmental Protection Equipment focuses on the iron and steel industry, and obtained the revenue of RMB380 million in 2011.

The report highlights the followings:

- ※ Development environment of China environmental protection equipment industry, including policy and investment environment;
- ※ Status quo, market supply and demand, competition pattern of China Environmental Protection Equipment Industry;
- ※ Operation and environmental protection equipment business of Major players in China environmental protection equipment industry (including Feida Environmental Science & Technology, Dongfang Electric Heating Technology, Create Technology and Science, Hangzhou Boiler, Western Power, Kelin Environmental Protection Equipment, Longking Environmental Protection, Combustion Control Technology, Shengyun Environment-Protection, Xingyuan Filter Technology, etc.);
- ※ Business indicators and profitability of major Chinese environmental protection equipment companies, forecast for Chinese environmental protection equipment market size in 2013-2015.



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