

China Sewage Treatment Industry Report, 2011

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Abstracts

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With the advancement of industrialization in China, the sewage discharge also witnesses a rising trend, from 42.84 billion tons in 2001 to 61.73 billion tons in 2010, with an annual increase of approximately 1.89 billion tons on average. In 2010, it increased by 2.81 billion from a year earlier, the biggest growth since 2005.

The increased sewage mainly comes from the growing domestic sewage. During 2001-2010, the domestic sewage rose from 22.77 billion tons to 37.98 billion tons, an average increase of roughly 1.52 billion tons each year, while the annual increase of industrial sewage is less than 1/4 of the former, about 370 million tons.

The surge of sewage discharge brought along heavy burden on the cities at all levels, but it also created opportunities for the sewage treatment industry. In recent years, the sewage treatment plants around China saw a construction boom, and the daily sewage treatment capacity soared to 125 million m³ in 2010 from 46.82 million m³ in 2003.

Concerning the construction of sewage treatment plants, there had been 2,832 urban sewage treatment plants constructed by 2010, while another 1,600 projects are under construction, with the designed capacity of around 39.00 million m³/day.

In China, the urban sewage treatment rate has rose from 52% in 2005 to over 75% in 2010, and it is expected to achieve 85% in the coming years. Moreover, the hike of the sewage treatment cost and the withdrawal and update of many laggard sewage treatment plants indicate still a large potential for the sewage treatment market.

Beijing Capital Co., Ltd. owns water projects in 14 provinces and 34 cities including Beijing, Tianjin, Hunan, Shanxi and Anhui, with sewage treatment capacity in excess of 5.73 million tons/day.

Beijing Enterprises Water Group Limited possesses and operates more than 70 tap water and sewage treatment plants in Beijing, Guangdong and other cities, with real sewage treatment capacity of 2.53 million tons/day.

Beijing Sound Environment Group Co., Ltd.: for the business related to sewage treatment, Beijing Sound Environment Group Co., Ltd. will submit a tender to win the sewage treatment project, then Sound Global Limited has the priority to get EPC subcontracting business of these projects, meanwhile, the two companies also undertake BOT business. The Group's sewage treatment projects cover Central China, Beijing and Inner Mongolia.

Beijing Originwater Technology Co., Ltd. (Origin Water) boasts No.1 market share amid the middle-and large-scale MBR sewage treatment projects.

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