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Research Report on Boiler Industry in China, 2011-2020

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Abstracts

Description

Coal is one of the major fuels for industrial production and daily life in China. However, most of the coal for industrial boilers is raw coal without washing and extraction, containing a high percentage of dust and sulfur with relatively larger molecule size. Therefore, The combustion efficiency of coal burning is low while the pollutant emission level is high which accounts for 45%- 65% of urban air pollution. Reducing the use of coal while promoting gas will be a fast and effective way to solve air pollution.

As China's environmental pollution is getting more serious, governments at different levels are gradually restricting the use of coal fired boilers. Besides, they also provide subsidies to companies for coal- to- gas transformation. Gas fired boilers rapidly take up the market share of coal fired ones.

Without governmental subsidies, it is not economically viable to transform one unit set of coal fired boilers into a single unite set of gas fired ones. However, it is practicable for the transformation of several sets of coal fired boilers into one set of gas fired ones.

In 2013, China's State Council officially published its Air Pollution Prevention and Control Action Plan, kicking off the cleaning of air pollution. In the plan, it put forward the idea of reconstructing small inefficient coal fired boilers, pointing out "by 2017, all prefecture- level or above cities, unless necessary to retain, should phase out coal fired boilers of 10 steam tons per hour or below in their built- up areas".

In 2014, seven government departments in China jointly published the Implementation Scheme for Comprehensive Promotion on Energy Saving and Environmental Protection

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for Coal Fired Boilers, mapping out that all prefecture- level or above cities in Beijing- Tianjin- Hebei Region and its surrounding area should phase out coal fired boilers of 10 steam tons per hour or below in their built- up areas and Beijing should abolish all coal fired boilers in its built- up areas by the end of 2015 unless necessary retaining; by 2017, all prefecture- level or above cities should phase out coal fired boilers of 10 steam tons per hour or below in their built- up areas in China and all prefecture- level or above cities in Hebei Province and Tianjin should phase out coal fired boilers of 35 steam tons per hour or below in their built- up areas. Upon this, authorities at different levels published their own Air Pollution Prevention and Control Action Plan respectively, so as to further specify and bring into action the target goals.

From the plan, it can be seen that Beijing- Tianjin- Hebei Region is the first tier under the most pressure to realize the goals. By 2015, it should close down all the coal fired boilers of 10 steam tons per hour or below and by 2017 all the coal fired boilers of 35 steam tons per hour or below. The second one includes Shanxi, Shandong etc. By 2015, they should close down all the boilers of 10 steam tons per hour or below in urban areas. Provinces such as Shaanxi, Jilin and Heilongjiang will be on a more relaxed track. They plan starts to abolish boilers of 10 steam tons per hour or below from 2017 on.

After the closing down of small coal fired boilers, most of the facilities will be transformed into gas fired or electricity fired ones in industrial dispersed areas except those extremely outdated production facilities; in industrial cluster districts for chemical, papermaking, printing and dyeing, leather and pharmaceutical, most of the coal fired boilers will be replaced by the construction of cogeneration units gradually with high efficiency boilers being brought in.

Heat and power cogeneration will be the major heat supply for industrial production. It is measured that if 25 units of electricity and 50 units of heat are separately generated, it will consume 152 units of coals, but if cogenerated, it only consume 100 units of coals. Through combining heat and power generation, heat conversion efficiency can be raised from 50% to 75%, or even higher conversion efficiency can be achieved if adopting high efficiency boilers or further processing the coal combustion.

For large scale boilers to meet the standards on air pollutant emission, it is necessary to bring in equipment for desulfurization, denitration and dedusting, which will promote the development of related markets.

The market room for small boiler transformation will be released in concentration in the

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next five years. It is estimated that China will phase out small coal fired boilers of 10 steam tons per hour and 35 steam tons per hour between 2016 and 2020, propelling investment in related areas of up to hundreds of billions of CNY every year.

Many local governments in China are adopting proactive measures to reduce and control industrial pollutant emissions. Projects such as Coal- to- Gas Fired Boiler and Coal- to- Power Fired Boiler are becoming the most popular ones for policymaking and the market.

For cities on the route of West- to- East Gas Transmission Project and pipelines for imported natural gas as well as for port cities capable of importing liquefied gas and their surrounding areas, gas fired boilers enjoy huge potential for further development in the future.

As gas fired boiler is a kind of environmental boiler, Chinese government will support and encourage its application. Therefore, it will enjoy a bright market prospect in China. It is estimated that coal fired boilers will gradually give way to gas fired boilers in the years to come, with the latter ones becoming the dominant product in the boiler market in China.

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