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Research Report on China Waste Incineration for Power Generation Industry, 2014-2018

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Abstracts

With the development of Chinese economy, upgrading of urbanization and changes of lifestyle, waste output keeps increasing, leading to serious environment pollution. Many cities are faced with garbage disposal problems. China has the most waste output in the world with more than 7 billion tons of untreated municipal solid waste that occupies over 3 billion square meters of land. Out of the 668 cities in China, two-thirds are surrounded by garbage. In one-fourth of the cities, garbage has to be transported to nearby rural areas, which brings about secondary pollution such as underground water contamination and stench.

The Twelfth Five Year (2011-2015) Plan of the Construction of Municipal Solid Waste Treatment Facilities issued by Chinese government states that harmless garbage disposal rate in Chinese cities will reach 90%, and that in rural areas will be 70% in 2015. Capacity of urban waste incineration facilities is expected to reach 35% of total harmless treatment capacity, of which the eastern region will surpass 48%. To achieve this goal, Chinese government launched a series of policies to encourage Waste Incineration for Power Generation projects. The national benchmark price of waste power generation was 0.65 CNY/kWh (tax included) in April 2012. The raised on-grid power tariff of waste power generation, tax preference and subsidies greatly promote the revenue and profitability of waste power generation enterprises. In addition, environmental policies in China become stricter and public awareness of environment protection increases, which both promote the development of waste power generation industry.

The waste incineration rate in China is between 15% and 20%. It is predicted to be 35% in 2015 and the national daily disposal capacity of municipal solid waste will be more than 870 thousand tons. Cities in China currently use landfill, compost and incineration

as methods of garbage disposal. The former two methods are constrained by land capacity and environment protection, making incineration the best method for garbage disposal.

China is entering a golden age of Waste Incineration for Power Generation. For instance, major cities compete to establish waste incineration power plants, and enterprises spend a large amount of money on mergers and acquisitions between Waste Incineration for Power Generation businesses. It is predicted that municipal solid waste treatment capacity in China will rise from 456.9 thousand tons/day to 871.5 thousand tons/day in 2011-2015 with the CAGR of 13.8%. The waste incineration capacity will increase from 89.6 thousand tons/day to 307.2 thousand tons/day, which grows 3.4 times with the CAGR of 28%. If unit size of newly built waste incineration plant is 1,000 tons/day, 200 more waste incineration plants need to be built from 2011 to 2015.

From a regional perspective, waste incineration scales in some key areas will increase sharply. The top five regions are Chongqing, Hainan, Shanghai, Beijing and Guangxi. The planned treatment scale in 2015 will be 5-8 times larger than that of 2010. The investment budget of garbage disposal facilities will exceed CNY 200 billion from 2011 to 2015. The total investment in Waste Incineration for Power Generation projects will reach CNY 100 billion. In China, there are dozens of investors in the field of Waste Incineration for Power Generation. Active enterprises in the market are Shanghai Environmental Protection (Group) Co., Ltd., Tianjin Teda Stock Co., Ltd., Jiangsu T.Y. Environmental Protection & Energy Co., Ltd. and Chongqing Sanfeng Covanta Environmental industry Co., Ltd.

In China, the waste incineration industry chain consists of waste incinerator, equipment integration and project contracting, and waste incineration operations. In the industry chain, equipment enterprises mainly engage in the production and selling of waste incineration facilities while engineering companies mainly provide technology support and installation of facilities for operating enterprises or downstream enterprises. Investment and operating enterprises are in charge of exploitation, overall plan and operation of waste power generation projects.

Features of waste power generation industry in China include high barrier to entry, sophisticated technology, clear business model, high investment, high return, sustainability, monopoly and government driving. In the long run, enterprises will not only benefit from government investment but also gain more profit by producing renewable resource products.

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The Waste Incineration for Power Generation industry is estimated to develop rapidly in the next few years. On the one hand, waste output continues to increase but the existing equipment has insufficient treatment capacity. As land cost in China increases and environmental protection pressure grows, waste incineration is expected to develop preferentially. On the other hand, the industry is favored by investors due to clear development plan and profit model. It is predicted that annual growth rate of waste power generation industry in China will be 20% in the next few years. Its industry revenue will rise from CNY 3 billion in 2010 to CNY 20 billion in 2020.

Through this report, the readers can acquire the following information:

Development Status of Waste Incineration for Power Generation in China

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