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Research Report on Environmental Protection Industry in China, 2014-2018

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Abstracts

Description

The proportion of investment in environmental protection remains low in GDP though the amount keeps increasing in recent years. The amount of investment is expected to grow significantly in 2014. Fog and haze remain the serious problems though the indices of sulfur dioxide and oxides of nitrogen decline in waste gas treatment in China. China reinforced the waste gas treatment to an unprecedented level in 2013. The industry chain of denitration will benefit as the denitration construction reaches a new high in 2014. Sewage treatment industry will enjoy new development opportunities based on industrial features and policy focuses as policies are launched in 2014.

Chinese government issues a series of policies to support the development of environmental protection industry in recent years. The industry of energy conservation and environmental protection will further develop due to the supportive policies in 2014-2018.

The waste gas treatment begins to take effect in China in recent years. The discharge amount of sulfur dioxide was 21.17 million tons in 2012, down by 4.52% YOY. Although it exhibits downward trend, the number is twice of the environment capacity and far higher than those in U.S. (10.36 million tons) and 27 European Union countries (5.68 million tons). The discharge amount of oxides of nitrogen declined from 24.04 million tons in 2011 to 23.38 million tons by 2.77%, including 70.93% of industrial emission and 27.38% of vehicle emission.

The State Council of China issued the Plan of Air Pollution Treatment on September 10, 2013. The Ministry of Environmental Protection of China signed the Letter of

Responsibility for Air Pollution Prevention and Control with 6 local governments, including Beijing, Tianjin and Hebei, and issued Implementation Rules of Air Pollution Prevention in Beijing, Tianjin, Hebei and the Surrounding Areas. Meanwhile, the Ministry of Finance of China invested CNY 5 billion to support the air pollution treatment in Beijing, Tianjin, Hebei and the surrounding areas. Implementation rules were issued by local governments, including the Key Missions of Clean Air Action Plan in Beijing in 2013-2017 published in September 2013, the 183 measures included in the Clean Air Action Plan in Shanghai published in October 2013, and the official implementation of Clean Air Action Plan in Tianjin in late October. The amendment draft of the Environmental Law mentioned to increase the financial investment in environmental protection. The Clean Air Act subject to air pollution is expected to be launched soon.

The policies on air pollution treatment provide financial support and reinforce the punishment for illegal actions. The fields related to waste gas treatment enjoy great development opportunities due to the supportive policies in China in 2014.

The total discharge amount of sewage maintains upward trend after 2005. The discharge amount was 68,460 million tons in 2012, up by 3.85% YOY. The discharge amount of household sewage was 46,270 million tons, which increased by 8.13% YOY and accounted for 67.59%. The discharge amount of industrial sewage was 22,160 million tons, which declined by 4.02% YOY and accounted for 32.37% of the total. The amount of investment in water pollution treatment will exceed CNY 1 trillion during the Twelfth Five-Year (2011-2015). The earnings are expected to reach CNY 1.2-1.3 trillion. In April 2012, the Ministry of Environmental Protection announced the "Twelfth Five-Year (2011-2015)" Plan of Sewage Treatment and Recycling, planning to build new sewer network of 159,000 km, new sewage treatment capacity of 26.11 million cubic meters every day, new mire treatment capacity of 5.18 million ton/year, new sewage recycling capacity of 26.75 million cubic meters every day. The amount of investment is CNY 430 billion.

The generation volume of ordinary industrial solid waste was 3.29 billion tons in 2012, up by 1.96%, including 1.1 billion tons of gangue, 460 million tons of fly ash, 370 million tons of coal gangue and 350 million tons of smelting attle with the proportions of 33.4%, 14.0%, 11.2% and 10.7% respectively. The treatment capacity of industrial solid waste is increasing though the generation volume continues to increase. The utilization volume of ordinary industrial solid waste was 2.02 billion tons in 2012 which increased by 3.71% YOY while the utilization ratio was 61.0%. If the Twelfth Five-Year (2011-2015) Plan of Comprehensive Utilization of Staple Industrial Solid Waste is realized, the output value of industrial solid waste market will be CNY 500 billion in 2015

while the number will exceed CNY 600 billion in 2017.

The State Council of China put real estate as the mainstay industry in 2003. The CAGR of investment in fixed assets was 27% in 2003-2013. In 2013, the State Council of China made energy conservation and environment protection as the new mainstay industry of Chinese economy. The industry of environment protection is expected to increase rapidly in the coming years.

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

Support Polices of Chinese Government on Environmental Protection Industry

Supply and Demand Status of Environmental Protection Industry in China

Operation Status of Sub-industries including Environmental Protection Equipment / Waste Gas Treatment / Refuse Disposal

Market Competition of Environment Industry

Major Environmental Protection Enterprises and the Operation Status in China

Prospect of Development of China Environmental Protection Industry

The following enterprises and people are recommended to purchase this report:

Manufacturers of Environmental Protection Equipment

Enterprises in Environmental Protection Service Industry

Enterprises Related to Industry Chain of Environmental Protection

Investors/Research Institutes Concerned about Environmental Protection Industry

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