

Research Report on China's Sewage Disposal Industry, 2012

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Abstracts

The sewage emission is closely related to the population change. The population of China ranks the top in the world. In 2010, the China's population reached 1.341 billion, with a rising trend yearly. Because water is an indispensable and daily-used resource in the ordinary lives of people, the water consumption increases with the rise of population, the corresponding water displacement also rises accordingly. Meanwhile, the demand for sewage disposal is on the rise.

In the past 30 years, 1.7 billion cubic meters of urban water consumption need to be added per 1% growth in the national urbanization level, including the added urban domestic water consumption of 940 million cubic meters and the urban industrial water consumption of 760 million cubic meters. With the deepening of urbanization, both the water consumption and water displacement rise, following by the increasing demand for sewage disposal. It is predicted that in the coming years, the urbanization progress of China will continue speeding up, plus with the increase of population, the total sewage displacement will keep increasing.

By the end of 2011, there are 3,135 urban sewage disposal factories in China, with the sewage disposal capacity of 136 million cubic meters per day, adding about 11 million cubic meters per day compared with that in the end of 2010.

By the end of 2011, there were 637 designated cities equipped with sewage disposal factories, accounting for 97% of the total designated cities; there were 1,841 sewage disposal factories constructed accumulatively, with the sewage disposal capacity of 112 million cubic meters daily; Sewage disposal factories were 153 more than that in the end of 2010, with sewage disposal capacity of 6 million cubic meters daily.

In 2011, the sewage of China's urban sewage disposal factories accumulated to reach 39.313 billion cubic meters in the whole year, increasing by 13.12% YOY; the average operation loading rate amounted to 79.45%, with a rise of 0.5 percentage point YOY; the total COD cutting in the whole year accumulated to reach 10.1775 million tons, with an increase of 9.52% YOY; the total ammonia nitrogen was cut by 845.3 thousand tons.

At present, the scale of China's sewage disposal industry is small, while the growth rate is always fast. During 2007 and 2011, with the increase of China's sewage disposal volume, the market scale of sewage disposal industry surmounted CNY 19 billion.

In terms of the sewage disposal capacity, the daily sewage disposal capacity of China cannot meet the volume needed to be disposed. With the low capacity utilization rate and other problems of the sewage disposal industry, a large number of untreated sewage flows into water bodies every year, so that the water environment is polluted. Taking the year of 2010 as an example, there were 112,798 sewage emission enterprises in China, while the number of sewage disposal equipment was only 80,332 sets. Meanwhile, the sewage utilization rate of China's cities was still low, lagging behind that in developed countries. The demand of the industry exceeded the supply, meaning that the development space for industrial supply is still large.

As an important part of environmental protection system, sewage disposal is regarded as the most promising segmentation industry of China's environmental protection industry. Driven by the gradual expanding demand for sewage disposal of the market and government policies, China's sewage disposal industry is expected to continue the rapid development trend. Plans on National Urban Sewage Disposal and Recycling Utilization Facility Construction of "The 12th Five-year-Planning" puts forward that the sewage concentration processing ability and sewage disposal rate of all designated cities and counties in China will be further increased by 2015. Sewage disposal rates of the country, county town and organic county will averagely reach 85%, 70% and 30% separately, further stimulating the development of sewage disposal industry.

More following information can be acquired through this report:

Current Operation of China's Sewage Disposal Industry

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China's Vital Sewage Disposal Enterprises

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