

Research Report on Chinese Sewage Treatment Industry, 2010-2011

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Abstracts

By the end of 2009, there were about 1,840 sewage treatment plants in China with the treatment capacity over 100 million m³/day, rising by over 20% YOY. The designed capability for urban sewage treatment projects under construction was more than 50 million m³/day.

Among Chinese 655 cities, 507 possess sewage treatment plants, totaling 1,266 with the sewage treatment capacity of 88.58 million m³/day. Among them, 319 sewage treatment plants have been set up in 36 large cities with the daily treatment capacity of 39.19 million m³.

With the increase in the volume of sewage treatment plants and their sewage treatment capacity, the sales of Chinese sewage treatment industry sees a stable growth. In 2009, the total revenue exceeded RMB 6 billion, over 20% increase over 2008.

Though the volume of Chinese sewage treatment plants remains increase, the utilization rate of the sewage treatment capacity is quite low. Among over 1,800 sewage treatment plants in China, the operation rate of half of them is only 50% resulting from the insufficient operation expenditures and backward construction of the sewage pipe networks.

By the end of 2009, 148 cities in China still had no sewage treatment plants, accounting for over 20% in China. Moreover, though sewage treatment plants have been constructed in some cities, they are not under operation. Over 70% towns in China do not own sewage treatment plants.

Chinese Ministry of Housing and Urban-Rural Development requires that cities and

organic towns with the county town must establish urban centralized sewage treatment facilities. Therefore, the town market with low sewage treatment capacity will become the new economic growth point for the sewage treatment industry in the following years. With the improvement in Chinese sewage treatment standards, most sewage treatment plants will be upgraded and reconstructed, providing a high investment demand.

On the whole, the demand for urban sewage treatment will not be satisfied in 2010 though the construction of sewage treatment plants will stay in rapid development. With the enhancement of the sewage treatment capacity, sewage treatment supply will be increased. With the strengthening in the energy-saving and emission-reduction policies, Chinese large and medium cities will see a decrease in the growth rate of the sewage discharge amount, realizing the supply-demand balance of the urban sewage treatment. The demand for new sewage treatment plants in cities will be reduced after 2011. Meanwhile, Chinese governments at all levels have placed stricter requirements on the sewage discharge, leaving huge potentials for the sewage treatment industry in Chinese small cities, towns and rural areas.

Considering the public interests in this industry, Chinese government makes vigorous efforts to realize the marketization of the sewage treatment industry to relieve their loads and improve the efficiency of sewage treatment plants. In the future, Chinese government will perfect related policies and measures to encourage domestic and foreign investments in the construction of Chinese sewage treatment plants.

Presently, the assets of Chinese sewage treatment industry concentrate in economically-developed coastal areas in Southeast China as it can acquire considerable sales revenues in these areas. In the initial stage, the high investment and long payback period of the sewage treatment industry lead to the scattered profits and heavy losses in those areas with high asset proportion. Nevertheless, the subsequent effectiveness of this industry is optimistic. With the industrial development in Central and West China, there are huge potentials in the industrial sewage treatment market in these regions.

Through this report, readers can acquire more information:

- Operation of Chinese sewage treatment industry, 2005-2009
- Main governmental policies in Chinese sewage treatment industry, 2005-2009
- Foreign investment policies in Chinese sewage treatment industry, 2005-2009
- Competition in Chinese sewage treatment industry, 2005-2009
- Entry and exit barriers in Chinese sewage treatment industry, 2008-2009
- Operation of Chinese sewage treatment industry by region, 2008-2009

- Technologies in Chinese sewage treatment industry, 2005-2009
- Major enterprises in Chinese sewage treatment industry and their operation, 2005-2009
- Prediction on the development trend of Chinese sewage treatment industry, 2010-2011
- Development risks in Chinese sewage treatment industry, 2010-2011
- Investment opportunities in Chinese sewage treatment industry, 2008-2009

Following persons are recommended to buy this report:

- Sewage treatment equipment manufacturers
- Sewage treatment enterprises
- Sewage treatment equipment traders
- Investors concerning the sewage treatment industry
- Research institutions concerning the sewage treatment industry
- Others concerning the sewage treatment industry

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