

# China Sewage Treatment Industry Report, 2009

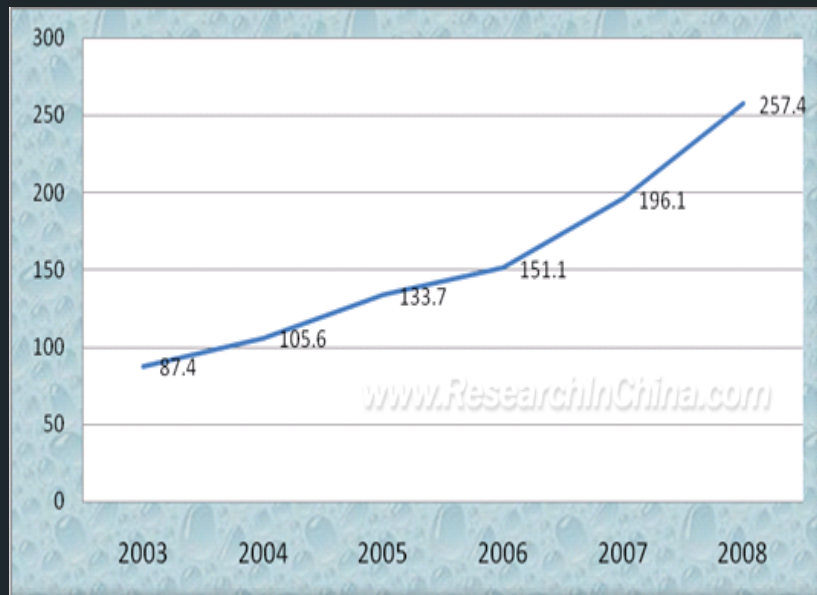


China has focused on sewage treatment, for which the investment increases yearly, from RMB8.74 billion in 2003 to RMB25.74 billion in 2008.

Bolstered by State policies, the construction of local sewage treatment plants progresses rapidly. Sewage disposal rose from 46.82 million cubic meters in 2003 to 82.95 million cubic meters in China in 2008. And, the pace of development is speeding up.

Against the trend of urban water supply towards consummation, China's urban sewage treatment industry has grown rapidly. Under the strengthening of environment protection and sustainable development, the growth room of sewage treatment industry is mainly from the increase in urban sewage discharge and improvement of sewage treatment rate, besides sewage treatment fee increases based on the corresponding price adjustment formula.

### Total Investment for Sewage Treatment in China, 2003-2008 (RMB100 million)



Source: State Environmental Protection Administration

Seen from discharge, the urban sewage discharge and water supply in China have a steady ratio excluding such variable factors as rainfall and water cyclic utilization rate. The urban water supply has transited towards maturity from growth, and the CAGR is about 1% in the recent five years. Meanwhile, the urban sewage discharge is relatively steady as well, with a CAGR of about 1.2% in next five years. The increase in sewage treatment rate is the key driver for the growth of sewage treatment industry.

The urban sewage treatment rate is the ratio of sewage disposal to sewage discharge. Now in China, there is still big room for the rise of sewage treatment rate, since it reaches more than 90% in the developed countries such as the United States. According to the 11th Five-year Plan Period, the average sewage treatment rate in cities in China will reach 70% by the end of 2010, and over 80% in provincial cities on average.

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