



**China Sewage Treatment Industry Report,
2010-2011**

Jun 2011

This report

- ◆ **Analyzes the status quo, opportunities and risks of China sewage treatment industry.**
- ◆ **Focuses on technologies and investment modes of sewage treatment industry.**
- ◆ **Highlights the operation of key enterprises in China.**

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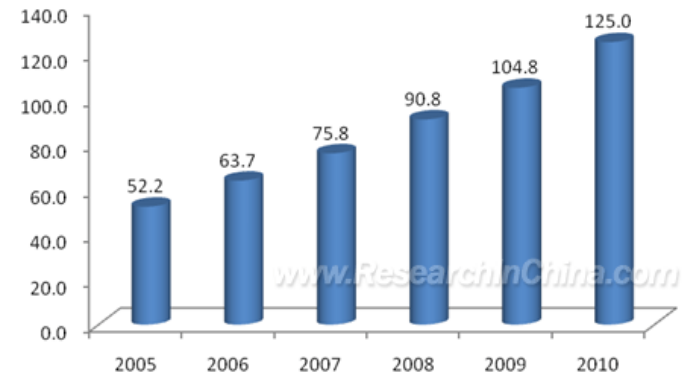
Abstract

With the advancement of industrialization in China, the sewage discharge also witnesses a rising trend, from 42.84 billion tons in 2001 to 61.73 billion tons in 2010, with an annual increase of approximately 1.89 billion tons on average. In 2010, it increased by 2.81 billion from a year earlier, the biggest growth since 2005.

The increased sewage mainly comes from the growing domestic sewage. During 2001-2010, the domestic sewage rose from 22.77 billion tons to 37.98 billion tons, an average increase of roughly 1.52 billion tons each year, while the annual increase of industrial sewage is less than 1/4 of the former, about 370 million tons.

The surge of sewage discharge brought along heavy burden on the cities at all levels, but it also created opportunities for the sewage treatment industry. In recent years, the sewage treatment plants around China saw a construction boom, and the daily sewage treatment capacity soared to 125 million m³ in 2010 from 46.82 million m³ in 2003.

Daily Treatment Capacity of Urban Sewage Treatment Plants in China, 2005-2010 (million m³)



Source: Ministry of Environmental Protection of the People's Republic of China; ResearchInChina

Concerning the construction of sewage treatment plants, there had been 2,832 urban sewage treatment plants constructed by 2010, while another 1,600 projects are under construction, with the designed capacity of around 39.00 million m³/day.

In China, the urban sewage treatment rate has rose from 52% in 2005 to over 75% in 2010, and it is expected to achieve 85% in the coming years. Moreover, the hike of the sewage treatment cost and the withdrawal and update of many laggard sewage treatment plants indicate still a large potential for the sewage treatment market.

Beijing Capital Co., Ltd. owns water projects in 14 provinces and 34 cities including Beijing, Tianjin, Hunan, Shanxi and Anhui, with sewage treatment capacity in excess of 5.73 million tons/day.

Beijing Enterprises Water Group Limited possesses and operates more than 70 tap water and sewage treatment plants in Beijing, Guangdong and other cities, with real sewage treatment capacity of 2.53 million tons/day.

Beijing Sound Environment Group Co., Ltd.: for the business related to sewage treatment, Beijing Sound Environment Group Co., Ltd. will submit a tender to win the sewage treatment project, then Sound Global Limited has the priority to get EPC subcontracting business of these projects, meanwhile, the two companies also undertake BOT business. The Group's sewage treatment projects cover Central China, Beijing and Inner Mongolia.

Beijing Originwater Technology Co., Ltd. (Origin Water) boasts No.1 market share amid the middle-and large-scale MBR sewage treatment projects.

1. Water Resources in China

- 1.1 Overview
 - 1.1.1 Reserves of Water Resources in China
 - 1.1.2 Utilization of Water Resources
- 1.2 Pollution of Water Resources in China
 - 1.2.1 Status Quo
 - 1.2.2 Sewage Discharge

2. Status Quo of China Sewage Treatment Industry

- 2.1 Sewage Treatment Industry
 - 2.1.1 Analysis on Sewage Treatment Market
 - 2.1.2 Size of Sewage Treatment Market
- 2.2 Sewage Treatment Plant
- 2.3 Sewage Treatment Equipment Market
- 2.4 Policy Guidance on Sewage Treatment Industry
- 2.5 Characteristics of Market Competition
- 2.6 Sewage Treatment in Key Cities

3. Technologies and Investment Modes of Sewage Treatment Industry

- 3.1 Technologies
- 3.2 Investment Modes
 - 3.2.1 BOT
 - 3.2.2 BT
 - 3.2.3 TOT

4. Key Companies

- 4.1 Tsinghua Tongfang Water Engineering Co., Ltd.
 - 4.2 Beijing Drainage Group Co., Ltd.
 - 4.2.1 Profile
 - 4.2.2 Sewage Treatment Business
 - 4.3 China Everbright International Limited
 - 4.3.1 Profile
 - 4.3.2 Operation
 - 4.3.3 Sewage Treatment Business
 - 4.4 Beijing Sound Environment Group Co., Ltd.
 - 4.4.1 Profile
 - 4.4.2 Sound Environmental Resources Co., Ltd.
 - 4.4.3 Sound Global
 - 4.5 Tianjin Capital Environmental Protection Group Company Limited
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Sewage Treatment Business
 - 4.6 Beijing Capital Co., Ltd.
 - 4.6.1 Profile
 - 4.6.2 Operation
 - 4.6.3 Sewage Treatment Business
 - 4.7 Beijing Enterprises Water Group Limited (BEWG)

- 4.8 Nanhai Development Co., Ltd.
- 4.9 Wuhan Sanzhen Industry Holding Co., Ltd.
- 4.10 Chongqing Water Group Co, Ltd.
- 4.11 Zhong Yuan Environment Protection Co., Ltd.
- 4.12 Jiangxi Hongcheng Waterworks Co., Ltd.
- 4.13 Chengdu Xingrong Investment Co., Ltd.
- 4.14 Origin Water
- 4.15 United Envirotech Ltd.

5. Opportunities and Risks in Sewage Treatment Industry

- 5.1 Investment Opportunities
 - 5.1.1 Opportunities from Building Environment-friendly Society
 - 5.1.2 Opportunities from Market Access
 - 5.1.3 Opportunities from Rise in Sewage Treatment Fee and Sewage Charge
- 5.2 Investment Risks
 - 5.2.1 Regional Economic Development and Enterprise Credit Standing
 - 5.2.2 Government's Support Willing
 - 5.2.3 Construction Project Planning
- 5.3 Suggestions to Investors
 - 5.3.1 Key Investment Directions
 - 5.3.2 Key Investment Regions
 - 5.3.3 Risk Prevention Measures
- 5.4 Suggestions on Bank Credit
 - 5.4.1 Judgment of Credit Risk
 - 5.4.2 Selection of Credit Opportunities
 - 5.4.3 Selection of Credit Ways

- 
- Per Capital Water Resource Possession by Country
 - Total Water Reserves of China, 2004-2010
 - Total Water Supply of China, 2004-2010
 - Total Water Consumption of China, 2004-2010
 - Average per Capital Water Consumption in China, 2004-2009
 - Water Consumption Per 1,000 Yuan of GDP in China, 2004-2010
 - Proportions of Water Quality Types of Major Rivers in China, 2009
 - Water Quality of Main Lakes in China, 2009
 - Sewage Discharge Volume in China, 2004-2010
 - Discharge Volume of Industrial Wastewater and Domestic Sewage in China, 2004-2010
 - Total Investment in Sewage Treatment in China, 2004-2009
 - Daily Disposal Capacity of Urban Sewage Treatment Plants in China, 2005-2010
 - Urban Sewage Treatment Rate in China, 2004-2010
 - Financial Data of China Sewage Treatment Industry, 2009-2010
 - China Sewage Treatment and Recycling Market Size, 2009-2010
 - Number of Urban Sewage Treatment Plants in China, 2003-2010
 - Number of Sewage Treatment Plants in Provinces of China, 2009
 - Designed Processing Capacity and Real Treatment Volume of Main Sewage Treatment Plants in Provinces of China, 2009
 - Sales of Environmental Protection Equipment in China, 2009-2010
 - Sewage Discharge and Disposal in Shanghai, 2004-2010
 - Sewage Discharge in Guangdong Province, 2004-2009
 - Sewage Disposal in Guangdong Province, 2004-2009
 - China Sewage Treatment Market by Technology
 - Modes of Sewage Treatment Plants of Tsinghua Tongfang Water Engineering Co., Ltd.

- 
- List of Sewage Treatment Plants of Tsinghua Tongfang Water Engineering Co., Ltd
 - Overview of Beijing Drainage Group
 - Sewage Treatment Plants Subordinated to Beijing Drainage Group
 - Turnover of China Everbright International Limited, 2006-2010
 - Sewage Treatment Business Turnover of China Everbright International Limited by Sector, 2006-2010
 - Sewage Treatment Business Turnover of China Everbright International Limited, 2006-2010
 - Main Sewage Treatment Plants of China Everbright International Limited
 - Main Business Scope of Sound Environment
 - Operation of Sound Environment, 2006-2010
 - Revenue from Water Sector of Sound Environment, 2006-2010
 - Operating Income of Sound Environment by Region, 2006-2010
 - Operation of Sound Global, 2006-2010
 - Revenue from Major EPC Business of Sound Global, 2007-2010
 - Operating Income and Total Profit of Tianjin Capital Environmental Protection Group Co., Ltd, 2006-2010
 - Operating Income of Tianjin Capital Environment Protection Group Co., Ltd by Sector, 2006-2010
 - Operating Income of Tianjin Capital Environment Protection Group Co., Ltd by Region, 2008-2010
 - Sewage Treatment Capability of Tianjin Capital Environmental Protection Group Co., Ltd, 2006-2010
 - Sewage Treatment Plants of Tianjin Capital Environmental Protection Group Co., Ltd
 - Operating Revenue and Profits of Beijing Capital, 2006-2010
 - Revenue Structure of Beijing Capital, 2010
 - Marketing Regions of Beijing Capital, 2010
 - Daily Water Treatment Capacity of Beijing Capital, 2005-2010
 - Main Treatment Projects of Beijing Capital as of the end of 2010
 - Operating Income and Profit of BEWG, 2008-2010
 - Operating Income Structure of BEWG, 2010

- Daily Sewage Treatment Capacity and Annual Sewage Treatment of BEWG, 2008-2010
- Main Treatment Projects of BEWG as of the end of 2010
- Operating Income and Profit of Nanhai Development, 2004-2010
- Business Structure of Nanhai Development, 2010
- Sewage Treatment of Nanhai Development, 2009-2010
- Main Sewage Treatment Projects of Nanhai Development at Present
- Sales and Profit of Wuhan Sanzhen Industry Holding Co., Ltd, 2004-2010
- Mix of Businesses of Wuhan Sanzhen Industry Holding Co., Ltd, 2010
- Sewage Treatment Volume of Wuhan Sanzhen Industry Holding Co., Ltd, 2005-2010
- Sales and Profit of Chongqing Water Group, 2007-2010
- Mix of Businesses of Chongqing Water Group, 2010
- Sewage Treatment Volumes of Chongqing Water Group, 2005-2010
- Sales and Profit of Zhongyuan Environment Protection Co., Ltd , 2007-2010
- Mix of Businesses of Zhongyuan Environment Protection Co., Ltd, 2010
- Operating Income and Profit of Hongcheng Waterworks, 2007-2010
- Mix of Businesses of Hongcheng Waterworks, 2010
- Sewage Treatment Volumes of Hongcheng Waterworks, 2006-2010
- Operating Income and Profit of Xingrong Investment, 2007-2010
- Main Sewage Treatment Plants of Xingrong Investment
- Operating Income and Profit of Origin Water, 2005-2010
- Mix of Businesses of Origin Water, 2010
- MBR Business Income of Origin Water, 2005-2010
- Performance of United Envirotech Co., Ltd, FY2009-FY2011
- Revenue Structure of United Envirotech Co., Ltd., 2010

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