



**China Flue Gas Treatment Industry
Report, 2011**

Sep. 2011

This report

- ◆ **Analyzes the development of flue gas treatment industry in China**
- ◆ **Focuses on the status quo of industrial flue gas emission and treatment in China**
- ◆ **Highlights the operation of key enterprises**

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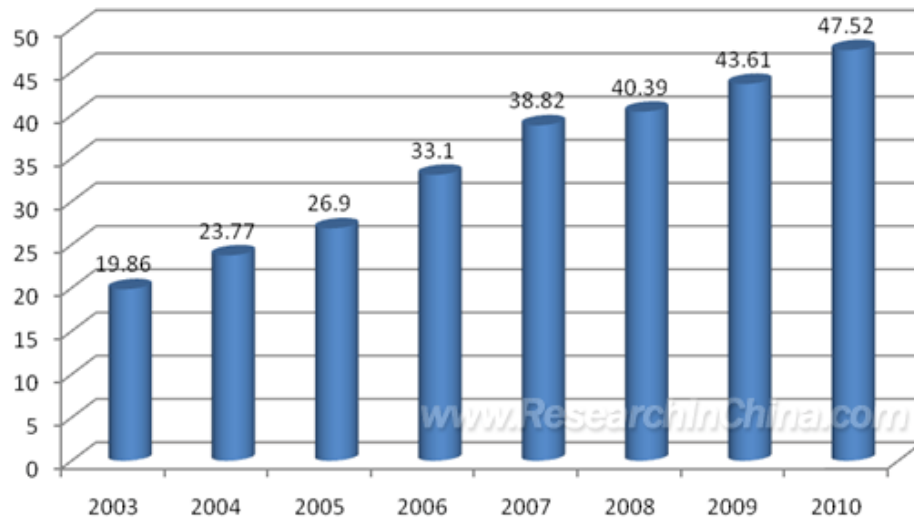
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Abstract

Currently, major air pollutants in China include sulfur dioxide, soot, industrial dust and nitrogen oxides. In 2010, industrial flue gas emission volume footed up to 47.52 trillion cubic meters, 1.38 times of that in 2003.

**Industrial Flue Gas Emission Volume in China, 2003-2010
(Trillion m3)**



Source: Ministry of Environmental Protection of the P. R.C.;
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Flue gas treatment industry has become one of the pillars of China's environmental protection industry, with its market size soaring to RMB 38.7 billion in 2010 from RMB 18.5 billion in 2006 and AAGR reaching 15.9%.

The demand for flue gas treatment in China is primarily from such sectors as electric power and steel, of which the demand from power sector accounts for over 80%. The electric power industry of China features a high degree of concentration among China Huaneng Group, China Datang Corporation, China Guodian Corporation, China Huadian Corporation and China Power Investment Group, all of which have set up their own subsidiaries for flue gas treatment. Therefore, the flue gas treatment subsidiaries under the major power corporations take the lion's share of China's flue gas treatment industry, while the private firms are occupying more and more market shares through introduction of advanced know-how on treatment of flue gas and application of flexible business strategy.

Beijing Guodian Longyuan Environmental Engineering Co., Ltd.,

affiliated to China Guodian Group, is China's largest enterprise in thermal power FGD (flue gas desulphurization). As of 2010, the installed capacity of FGD systems reached 62.417 GW, and the new installed capacity was 6.73 GW in 2010.

Beijing Boqi Electric Power SCI-TECH Co., Ltd., the second largest enterprise engaging in FGD in China, is listed on Tokyo Stock Exchange.

By 2010, the installed capacity of FGD systems registered 48.206 GW, and the newly-added capacity reached 2.66 GW in 2010. Wet Limestone-Gypsum FGD serves as the company's dominant desulfurization process.

SEC-IHI Power Generation Environment Protection Engineering Co.,

Ltd., co-invested by Shanghai Electric Group and Ishikawajima-Harima Heavy Industries Co., Ltd., is a joint venture involved in flue gas treatment, with its flue gas denitrification business ranking first in China. As of 2010, the installed capacity of flue gas denitrification systems reached 11.64 GW, taking around 12% market shares.

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