



China Sewage Treatment Equipment Market Report, 2011-2012

Dec. 2011

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind and the Ministry of Environmental Protection of the People's Republic of China etc.

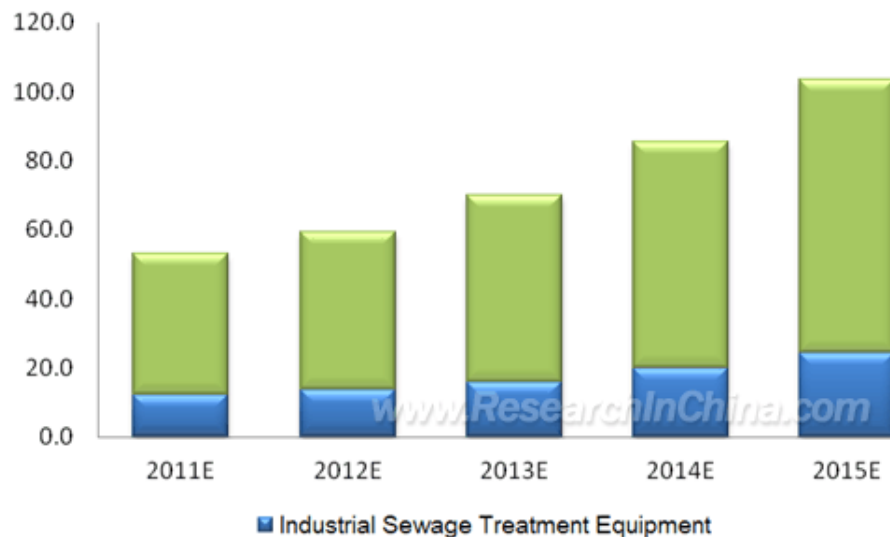
Abstract

With the deepening of industrialization and urbanization in China, the investment in sewage treatment field will keep sustained growth in China, but the short-term investment growth rate presents a downward trend.

In 2010, the investments into Chinese sewage treatment industry footed up to RMB86 billion, up 26% from a year earlier, yet with lower investment growth rate than that in 2009. In 2011, investment growth rate falls to 15% or so, and then in 2013 it will recover to 18%.

Against the field of industrial sewage treatment, domestic sewage treatment is a sector invested by the Government, with strong rigid investment; therefore, the demand for domestic sewage equipment will remain stable in 2011 and 2012. **Under economic downturn, most companies may postpone the renovation of their sewage treatment systems; and the demand for industrial sewage treatment equipment will decrease in 2012, but it will rebound from 2013 to 2015.**

Demand for Sewage Treatment Equipment in China (by Sector), 2011-2015 (RMB bn)



Source: ResearchInChina

This report covers the following:

- ✿ The development status quo of Chinese sewage treatment equipment market, film processing equipment (MBR, Membrane Bioreactor) market and sludge treatment equipment market;
- ✿ Estimation of the demand in Chinese sewage equipment industry;
- ✿ Investment advices;
- ✿ Operation of sewage equipment companies.

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Beijing Originwater Technology Co., Ltd. is engaged in membrane materials & equipment manufacturing and process development in the fields of sewage resourcization and drinking water security. Originwater's development model is presented as follows: through transferring the holding rights of local sewage treatment projects, it cooperates with local governments to set up joint ventures and becomes a water treatment technical supporter and equipment provider of the local governments.

Hangzhou Xingyuan Filter Technology Co., Ltd. is primarily focused on the development, manufacture and sales of pressure filters. The company can produce 1,300 sets of pressure filters, including 100 large ones and 500 medium-sized ones. It is presently constructing the 800-unit large and medium-sized membrane pressure filter production line project and a technology R&D center project. Pressure filter can be used in sludge drying process. The company was once involved in sludge drying process projects of Shougang Group and Xiamen Water Group.

Wuxi Huaguang Boiler Co., Ltd. mainly produces circulating fluidized boilers, pulverized coal boilers and special boilers. Sludge incineration mainly makes use of circulating fluidized bed incinerators which have been in the main produced in China. The circulating fluidized-bed incinerators produced by most companies find general application in garbage incineration, only Wuxi Huaguang and a few others set foot in sludge incineration. In H1 2011, Wuxi Huaguang generated operating revenue of RMB1.01 billion from circulating fluidized bed boilers, up 25.88 % year-on-year and sharing 57% of total revenue; its gross margin was 15.18%.

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