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World Water Treatment Products

Industry Study with Forecasts for **2011 & 2016**

Study #2276 | January 2008 | \$5800 | 362 pages

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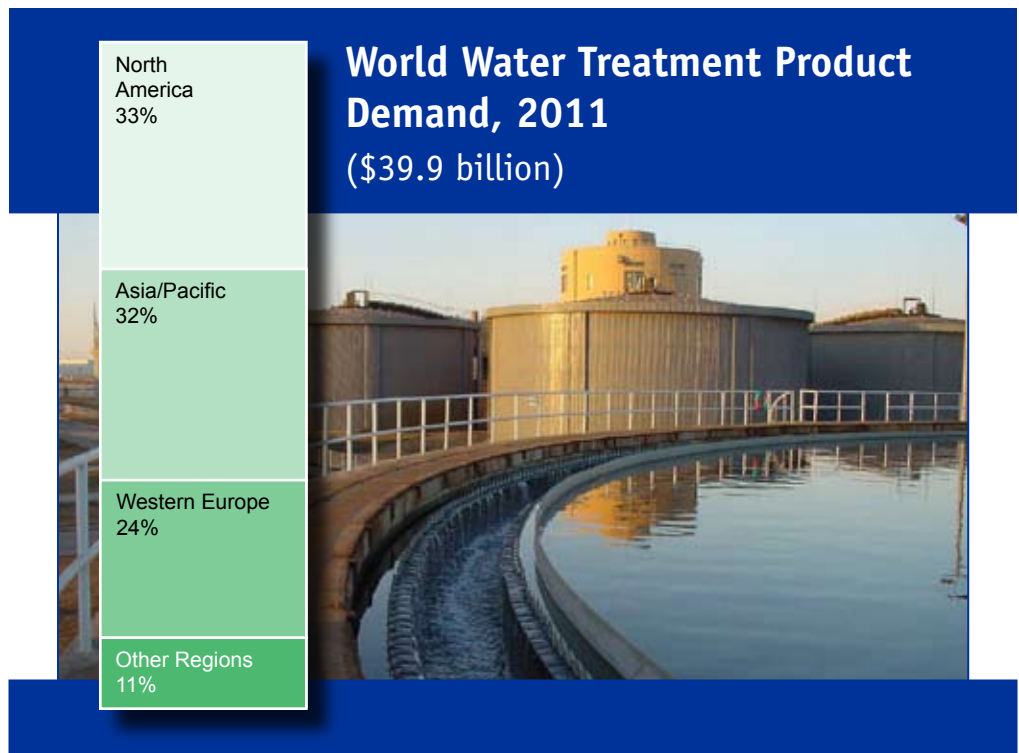
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Advances in water treatment product demand will be particularly strong in the developing world, with countries such as China and India registering growth more than double the global average.

Global demand to rise 6.4% annually through 2011

World demand for water treatment products, chemical and nonchemical, is projected to increase 6.4 percent per year to nearly \$40 billion in 2011. Although low-cost commodities -- chlorine, lime and alum -- will continue to dominate the municipal market in volume terms, municipal water treatment will register above-average growth through the forecast period. In developing areas, this will result largely from efforts to expand access to improved water to previously unserved populations, often in less urbanized areas. Additionally, the number of urban residents in China and Africa continues to grow much more rapidly than the population as a whole, which will raise the population served by municipal plants.

In Latin America, Asia and Africa, there will also be substantial upgrades in wastewater treatment, with both better treatment quality and larger quantities of water receiving treatment prior to discharge. However, gains will be nearly as strong in the industrial segment. These advances will be prompted by increased use of recycled water, which generally requires more aggressive treatment. Sharp increases in the overall level of manufacturing in the Asia/Pacific region will make it the fastest growing industrial water treatment market, although the United States will remain by far the largest single outlet for both municipal and industrial water treatment products.



Filtration, disinfection to outpace chemical treatment

Overall, demand for nonchemical water treatment equipment and supplies is projected to register faster growth than chemical products. Conventional filtration equipment will still account for a substantial share of the market, especially in municipal water treatment settings. However, more advanced techniques, especially membrane separation, are expanding their presence in the water treatment market, not only in the most developed countries, but in developing regions as well, particularly in China, which has been quick to embrace membranes in industrial water treatment. Nonchemical disinfection equipment, mostly ultraviolet (UV) and ozone

generation equipment, is expected to register the fastest growth of any product category. UV and ozone have become increasingly popular water treatment technologies, as they allow for a dramatic reduction in chemical disinfectant dosages, which minimizes the creation of undesirable disinfection byproducts (DBPs). Growth for water treatment chemicals is expected to be below the overall average, but will still be appreciable. Advances will be prompted by greater use of chemicals in industrial water treatment, especially in developing countries in Asia and Eastern Europe. In developed countries, value gains for chemicals will result from a shift to specialty chemicals, particularly in the industrial market.

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Sample Table, Text & Forecast

ASIA/PACIFIC

China: Water Treatment Product Demand

Demand for water treatment products in China is projected to increase rapidly to \$2 billion in 2011. China's water treatment market will be rapid in growth. The market will be leading growth in rising activity. The market will be boosted by continuing urbanization and expanding access to municipal water supplies. The market will be prompted by increasing tourism accommodations, in particular Beijing's selection as the site for the 2008 Olympic Games. The government has committed to an effort to drastically improve the nation's water infrastructure, increasing access to safe water and both the rate and quality of wastewater treatment.

Compared to most countries with modern industrialized economies, China trails in terms of the proportion of water that is treated, the extent to which its water is treated, and the technological sophistication of the treatment techniques employed. The great majority of water is treated in municipal facilities still does not approach the standards required by regulation in the US or EU, and usually must be treated to consumption. In large sections of China, water is used with little or no prior treatment. Wastewater treatment standards trail Western standards by an even larger margin. In recent years, however, the Chinese government has demonstrated a greater commitment to improving access to safe water, to improve the quality of water produced by municipal suppliers, and to require more effective treatment of wastewater. This development, coupled with the strong rates of economic growth and increased industrial output, will make China the fastest growing market among large countries for water treatment products. This favorable market outlook is further intensified by the extent to which water treatment standards in China will have to improve in order to become more comparable with those in Japan, the United States or Western Europe. It

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SAMPLE
TEXT

TABLE VI-6

CHINA: WATER TREATMENT PRODUCT DEMAND BY TYPE & MARKET (million dollars)

Item	1996	2001	2006	2011	2016
Mfg Value Added (bil 2005\$)	1130	1720	3450	5510	8080
\$ water treatment/000\$ MVA	0.4	0.6	0.7	0.9	1.2
Water Treatment Demand	4188	5414	8340	12930	20080
By Type:					
Nonchemical					
Filtration & Separation					
Equipment & Systems					
Consumables					
Disinfection & Other					
Chemical					
Corrosion Inhibitors					
Oxidizers & Biocides					
Coagulants & Flocculants					
Other					
By Market:					
Industrial					
Municipal					
Residential/Commercial					
% China	88	88	88	88	88
Asia/Pacific Water Treatment Demand	4188	5414	8340	12930	20080

SAMPLE
TABLE

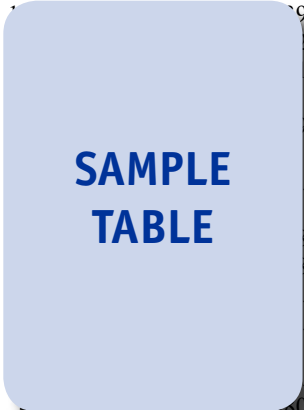
"Water treatment product demand in industrial applications is expected to grow 6.1 percent per year to \$21.4 billion in 2011. The continuing industrialization of the developing world, most notably but not exclusively in China, will result in the strongest opportunities. In developed nations, the trend toward greater water recycling and solid growth in several key markets will create opportunities, despite some deceleration in global manufacturing activity."

--Section III, pg. 74

Sample Profile, Table & Chart

TABLE VI-5
CHINA: MARKET ENVIRONMENT
(billion 2005 dollars)

Item	1996	2001	2006	2011	2016
Resident Population (mil)	1,210	1,270	1,330	1,390	1,450
GDP/capita	1,000	1,500	2,000	2,500	3,000
Gross Domestic Product	1,210	1,900	2,660	3,475	4,350
Electricity Generation (bil kWh)	1,000	1,500	2,000	2,500	3,000
Water Use (cubic km)	1,000	1,500	2,000	2,500	3,000
Gross Fixed Investment	1,000	1,500	2,000	2,500	3,000
Manufacturing Value Added	1,000	1,500	2,000	2,500	3,000
Food, Beverage, Tobacco MVA	1,000	1,500	2,000	2,500	3,000
Paper & Board Prdn (mil metric ton)	1,000	1,500	2,000	2,500	3,000
\$ water treatment/000\$ MVA	1,000	1,500	2,000	2,500	3,000
Water Treatment Demand (mil \$)	1,000	1,500	2,000	2,500	3,000



COMPANY PROFILES

Christ Water Technology AG
 Walter-Simmer-Strasse 4
 5310 Mondsee
 Austria
 43-6232-
 http://ww

SAMPLE PROFILE

Sales: \$
 Geograp
 and Othe
 Employr

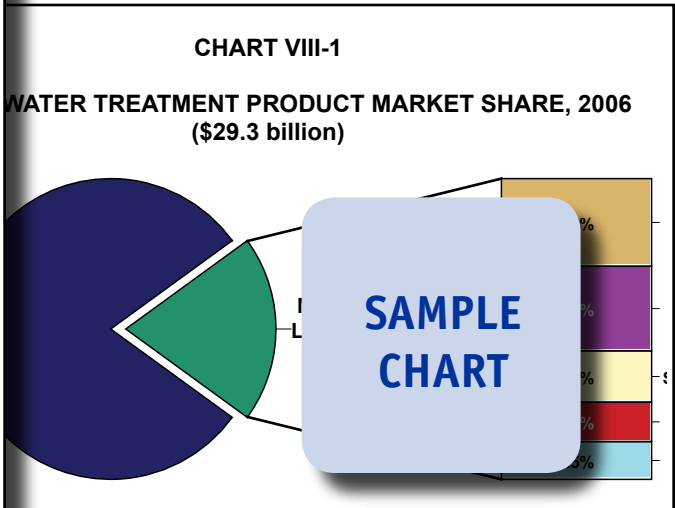
Key Products: electrodeionization modules, ion exchange systems, sanitization and distribution devices, distillation units, purified and highly purified water generation equipment, ultrafiltration systems, reverse osmosis systems, ultraviolet light and ozone disinfection systems, and raw water pretreatment and purified water treatment equipment

Christ Water Technology is a global manufacturer and marketer of products for the treatment of drinking, process and ultrapure water, as well as wastewater, for industrial and municipal applications. The Company conducts operations through four segments: Pharma and Life Science, Food and Beverage, Ultrapure Water, and Municipal Water Treatment.

The Company is active in the world water treatment products industry through all four segments. The Pharma and Life Science segment, which had 2006 sales of \$61 million, manufactures water treatment products for the pharmaceutical and life sciences industries. The Food and Beverage segment, which had 2006 sales of \$32 million, makes water and wastewater treatment, and other products for the food and beverage industries. The Ultrapure Water segment, which had 2006

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Membrane Separation Technologies

This study analyzes the US membrane separation industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by membrane type (e.g., cellulosic, polysulfone, nylon, ceramic); application (e.g., microfiltration, reverse osmosis, ultrafiltration, pervaporation); and market (e.g., water and wastewater treatment, food and beverage processing, pharmaceuticals and health care. The study also reviews technology, evaluates company market share and profiles leading competitors.

#2307 03/2008..... \$4600

World Industrial Valves

This study analyzes the global industrial valve industry. It presents historical demand data (1996, 2001, 2006) and forecasts for 2011 and 2016 by valve product (e.g., standard multiturn, quarterturn, automatic control, regulator, automatic actuator); world regional market (e.g., North America, Asia/Pacific, Western Europe); and for 34 major national markets. The study also considers market environment factors, details industry structure, evaluates company market share and profiles leading valve producers.

#2297 03/2008..... \$5500

World Filters

This study analyzes global filter supply and demand. It presents historical demand data (1996, 2001, 2006) and forecasts for 2011 and 2016 by filter product (e.g., oil, air intake, fluid power, panel and pocket air purification); market (e.g., transportation equipment, utilities, manufacturing, consumer); world region (e.g., North America, Asia/Pacific, Western Europe); and for 26 major national markets. The study also considers market environment factors, evaluates company market share and profiles leading competitors.

#2295 03/2008..... \$5800

Air Pollution Control in China

Demand for air pollution control equipment in the world's leading emitter of sulfur dioxide and other air pollutants will grow 18% annually through 2010. Particulate removal equipment will remain the largest product category and grow the fastest. Manufacturing and utilities will stay the top markets. This study analyzes the ¥30 billion Chinese air pollution control industry for 2010 and 2015 by product, market and region. The study also evaluates company market share and profiles leading industry players.

#2163 04/2007..... \$4900

Consumer Water Purification & Air Cleaning Systems

US consumer water and air treatment system demand will grow 4.7% yearly through 2010. Gains will be driven by home air and water quality concerns, quieter and more user-friendly systems, and better filter replacement compliance. Conventional types will remain dominant while higher value systems lead gains. This study analyzes the \$1.3 billion US consumer water purification and air cleaning system industry for 2010 and 2015 by product, market and region. It also details market share and profiles major players.

#2088 09/2006..... \$4400

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