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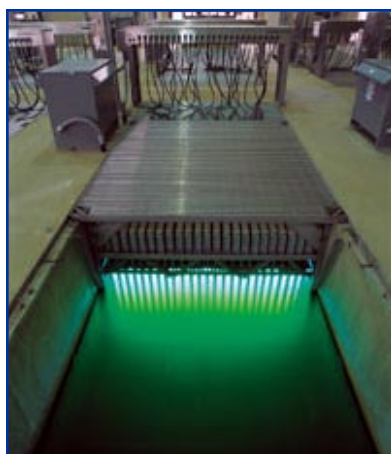
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World Water Disinfection

Industry Study with Forecasts for **2012 & 2017**

Study #2412 | October 2008 | \$5700 | 297 pages

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INDUSTRY STRUCTURE

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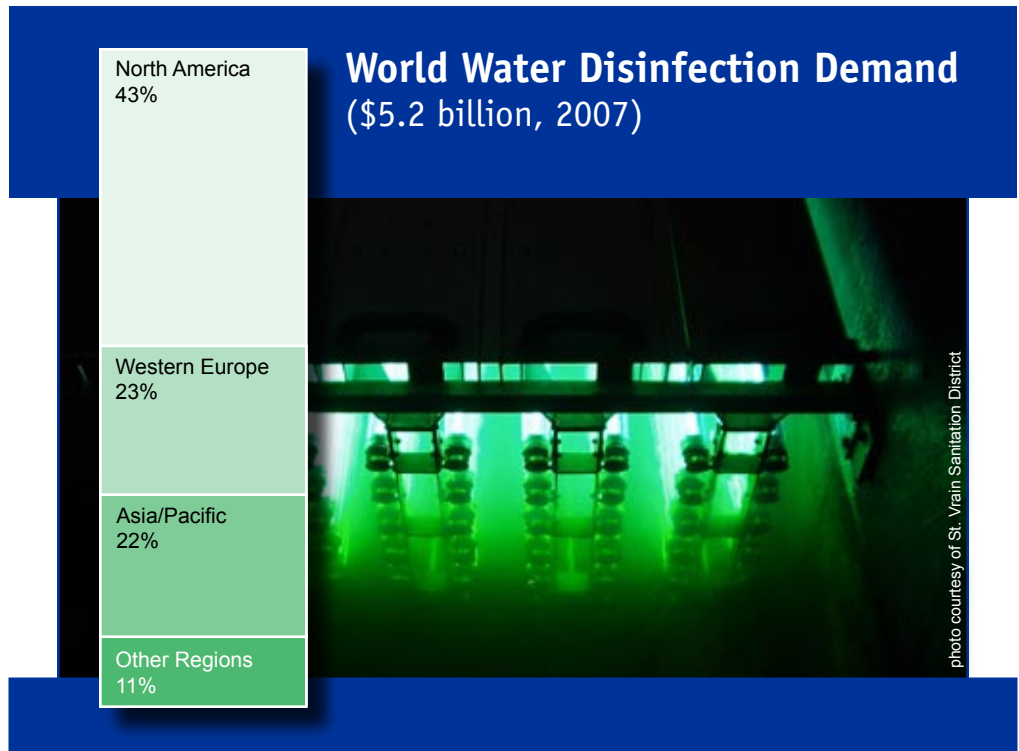
Growth will be fastest in China, India and other developing countries, especially those with large industrial sectors. However, growth is expected to be substantial in nearly every region.

Global demand to increase 7.4% yearly through 2012

Global demand for water disinfection products is projected to increase 7.4 percent annually to \$7.4 billion in 2012. Overall, growth will be fastest in China, India and other developing countries, especially those with large industrial sectors. Growth in these regions will be based on dramatic expansions in the use of relatively traditional water treatment techniques and products, which will boost overall demand for disinfection products. Industrialization in many of these areas will also drive growth for higher value specialty biocides. In many of the least developed countries -- especially in Africa -- growth will be more limited, due to spotty success in expanding infrastructures due to lack of adequate funding and local corruption.

Developed countries to also show healthy growth

The US is expected to register healthy growth due to upgrades of disinfection techniques in an otherwise mature market. This will be a continuation of a longstanding trend favoring better performing specialty chemicals at the expense of chlorine and other commodities. This shift, more or less complete in the industrial segment, is beginning to affect the municipal segment. Municipal water treatment operators have begun to use chloramines and other chemicals that allow for reductions in disinfection byproducts while maintaining chlorine



residual levels in compliance with regulatory guidelines. Additionally, these same motivations are prompting greater adoption of UV and ozone disinfection, which are often used in tandem with chlorine or other chemicals.

Western Europe and Japan are fairly comparable to the US in terms of the level of maturity of their respective water infrastructures and level of technological sophistication, although there are some differences. Western Europe has been an earlier adopter of nonchemical disinfection techniques and has become less reliant on chlorine. Moreover, neither Western Europe nor Japan are nearly as large a market for recreational water treatment as the US.

Municipal water market to be fastest growing

The municipal water segment is projected to register the best growth, as there will be some level of growth in nearly every country, due to expansions or upgrades of water infrastructures, particularly in the wastewater segment. The industrial segment will register more modest growth due to the maturity of the largest industrial markets, but will be fueled by advances in developing industrial powers. The recreational segment will post the slowest growth, due to the maturity of the larger, more affluent markets that account for most of the world's sales.

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Sample Text, Table & Chart

NORTH AMERICA

Mexico: Markets

The industrial segment...
 in the Mexican water disinfection...
 largest crude oil producers...
 complex, including downstream...
 Other important industrial out...

**SAMPLE
TEXT**

Unlike the US and Canada, Mexico is not endowed with...
 mous supply of clean water, and less of Mexico's population has access...
 to improved water and sanitation, although the country continues to...
 improve in that regard. Moreover, a much larger share of water used...
 in Mexico is dedicated to agricultural production than in either Canada...
 or the US. The growth of the nation's largest cities and overall popula-...
 tion in recent decades has exacerbated the problem of water access and...
 water quality. Mexico City, one of the world's most populous cities, is a...
 vivid example of the problem. The city is sinking due to the amount of...
 groundwater that has already been pumped from beneath it. Surrounding...
 lakes have already been drained, and an outdated delivery system loses...
 far more of its water to leakage than do systems in Canada or the US.

These problems, however, do provide growth potential in the...
 municipal market. Although some measure of this growth has been...
 realized, it has not been as remarkable as some have expected. Waste-...
 water disinfection represents another strong opportunity in the Mexican...
 market, especially as reclaimed wastewater is a valuable resource in...
 any location without abundant fresh water supplies. Treatment rates for...
 industrial and municipal wastewater are still well below the regional...
 average. Although there has been considerable improvement in this area,...
 the upside for market growth for chemicals and equipment in wastewater...
 disinfection applications remains substantial.

TABLE IV-11

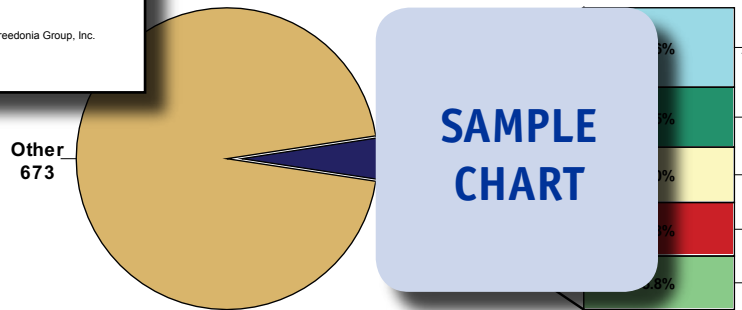
MEXICO: WATER DISINFECTION MARKETS
 (million dollars)

Item	1997	2002	2007	2012	2017
Gross Domestic Product (bil 2006\$)					
\$ disinfection/mil \$ GDP					
Water Disinfection Demand					
Industrial					
Recreational					
Municipal:					
Supply Water					
Wastewater					

**SAMPLE
TABLE**

CHART VIII-1

WATER DISINFECTION PRODUCT MARKET SHARE, 2007
 (\$5.2 billion)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-10
MEXICO: WATER DISINFECTION PRODUCT DEMAND BY TYPE
 (million dollars)

Item	1997	2002	2007	2012	2017
Resident Population (mil)	9				7.8
\$ disinfection/capita	0				36
Water Disinfection Demand					50
Chemical:					79
Chlorine					21
Chlorine Derivatives					34
Bromine Derivatives					8
Other					16
UV Equipment					50
Ozone Equipment					21
% Mexico					9
NA Water Disinfection Demand	11				60



COMPANY PROFILES

BWT AG
 Walter-Simmer-Strasse 4
 5310 Mondsee
 Austria
 43-6232-5011-0
 http://www.bwt.com

Sales: \$...
 Geograph...
 40%, Fra...
 and Swit...
 Employr...

Key Proc...
 systems

SAMPLE PROFILE

...ria and Germany
 Italy and Spain 8%,

...chemical disinfection

BWT develops and produces water treatment products and solutions for residential, commercial, industrial and swimming pool applications. In addition, the Company develops fuel cell technologies and products. The Company operates in five geographic segments: Austria/Germany, France/Benelux, Scandinavia, Italy/Spain, and Switzerland/Others.

The Company participates in the world water disinfection industry through all five segments. Through these segments, BWT manufactures a variety of water treatment products, including disinfection equipment, under such brand names as AQA TOTAL ENERGY, BWT, CILLIT, PERMO and HOH for the residential, institutional, utility and commercial markets. Water disinfection offerings encompass ultraviolet (UV) light, ozone gas and chemical disinfection systems.

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“Demand for water treatment products in Mexico is projected to grow 7.4 percent per year through 2012 to \$110 million, above the North American forecast average pace through the period. This represents a slowdown from the pace of the 2002-2007 period. During that timeframe, there was considerable activity undertaken to extend access to improved water and sanitation facilities to a larger share of the population, especially outside the larger metropolitan areas.”
 --Section XXX, pg. 000

OTHER STUDIES

Consumer Water Purification & Air Cleaning Systems

This study analyzes the US consumer water purification and air cleaning system industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by technology (e.g., conventional filtration, reverse osmosis, distillation, ultraviolet disinfection, ozone treatment, electrostatic, ionization), system (e.g., point-of-entry, point-of-use, whole-house, portable) and US region. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2419 10/2008..... \$4700

Water Treatment in China

Demand for water treatment products in China will soar 15.5% annually through 2012. Filters and membranes will be the fastest growing segments, although all types will see double-digit gains. The industrial sector will remain the largest market, but will be outpaced by municipal and other end uses. The study analyzes the ¥20.4 billion water treatment product industry in China, with forecasts for 2012 and 2017 by product, market and region. It also evaluates company market share and profiles leading industry players.

#2329 04/2008..... \$5100

Membrane Separation Technologies

US membrane material demand will rise 8.2% annually through 2012, driven by ongoing interest in higher purity process fluids and increasingly strict water/wastewater quality rules. The best opportunities will emerge in pharmaceutical and medical markets, and water and wastewater treatment will remain the largest markets. This study analyzes the \$2.9 billion US membrane industry, with forecasts for 2012 and 2017 by type, application and market. It also details market share and profiles major players.

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

World Filters

Global filter demand will climb 5.6% annually through 2011. Developing areas will lead gains based on faster-growing economies and the enactment of stricter environmental laws. China, India and Russia will post some of the strongest sales growth. Air and fluid filters will be the fastest growing types. This study analyzes the \$37 billion world filter industry, with forecasts for 2011 and 2016 by product, market, world region and for 26 countries. It also evaluates company market share and profiles major players.

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

World Water Treatment Products

Global demand for water treatment products will grow 6.4% annually through 2011. Advances will be the fastest in the developing world, especially China and India. Gains in more established markets will be driven by technology upgrades such as higher-end membranes in desalination and other uses. This study analyzes the \$29.3 billion world water treatment product industry, with forecasts for 2011 and 2016 by product, market, world region and 20 countries. It also details market share and profiles major players.

#2276 01/2008..... \$5800

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