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World Water Treatment Products

Industry Study with Forecasts for **2013 & 2018**

Study #2563 | November 2009 | \$6100 | 523 pages

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Large yet still developing markets such as China and India will register the fastest growth, due to concerted efforts to expand access to safe water supplies and adequate sanitation facilities.

Global demand to increase 5.7% yearly through 2013

World demand for water treatment products is projected to increase 5.7 percent per year to \$59 billion in 2013, well above the rate of economic growth in essentially every region. Large yet still developing markets such as China and India will register the fastest growth, due to continued industrial expansion and concerted efforts to expand access to safe water supplies and adequate sanitation facilities, especially in rural areas. In more developed markets, advances will also be fairly strong, due to initiatives that focus on improving drinking water quality, reducing wastewater discharge and increasing wastewater treatment and reutilization rates.

Growth factors to vary greatly among regions

While the recent economic downturn will result in some deceleration of market growth from the very strong advances posted in the 2003-2008 period, prospects in most regions will remain substantial. However, the reasons underlying the continuing expansion of the water treatment products market around the world vary immensely among regions. In the most developed markets -- the US, Canada, Japan and most of Western Europe -- gains will result from efforts to increase water reuse rates, improve the aesthetic quality of drinking water and further reduce the chances of water contamination. Such efforts will boost demand for products such as advanced



membrane systems, disinfection equipment and specialty chemicals used in industrial wastewater treatment.

In somewhat less developed, industrializing nations, gains will be prompted by expansion of sanitation services, access to which in many countries remains considerably less than that for water supply systems. Industrial water treatment gains will result from efforts in these countries to meet rising global standards for wastewater reclamation and effluent discharge quality. For example, the former Warsaw Pact nations that have recently joined the European Union are racing to improve their water access and quality, as well as wastewater treatment standards.

Gains to be the fastest in the least developed areas

In the least developed parts of Asia and Africa, market gains will be among the fastest in the world. In the large Middle Eastern market, gains will be prompted by continued expansion of desalination capacity in the region, not only in market leaders Saudi Arabia, the United Arab Emirates and Kuwait, but also in countries such as Algeria, Israel and Libya. The expansion of desalination will boost demand for evaporators and membrane systems, but will limit opportunities for chemicals and other water treatment products that are not used as much for desalinated water, which usually has very low levels of dissolved solids.

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**Sample Text,
 Table & Chart**

ASIA/PACIFIC

China: Water Treatment Products -- Chemicals remain the largest product category, although membrane systems will be the same size by 2013. The fastest growing segment is disinfection equipment. However, disinfection is already rapid pace for the water treatment market. Chemical disinfection equipment will be the overall demand in 2013.

**SAMPLE
 TEXT**

In the chemical segment, growth is driven by several factors. China's economy will continue to register remarkable growth which will boost demand for industrial water treatment chemicals. Also, water treatment standards in China will be brought closer to those of more developed nations as tighter water quality regulations and wastewater discharge standards are implemented and, more importantly, enforced. Continuing shifts of the Chinese population from rural to urban -- where water treatment practices are minimal where they exist -- to urban areas served by municipal water supply systems will boost demand in the municipal water treatment segment. These systems have been the subject of efforts to improve the quality and safety of the water they supply, which will bolster demand for water treatment products in China. Moreover, construction of additional wastewater treatment plants will boost the use of chemicals and other products in wastewater treatment generation, as China continues its effort to treat much more of the wastewater it generates, and to do so more effectively.

Combined, filtration and membrane systems account for a majority of the remainder of water treatment product demand in China. Compared with some product segments, filtration is a relatively mature market, as filtration systems have been in place in Chinese cities for decades. However, there is an ongoing shift favoring better performing equipment, such as more advanced separation technologies. At the other

234

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TABLE VI-6

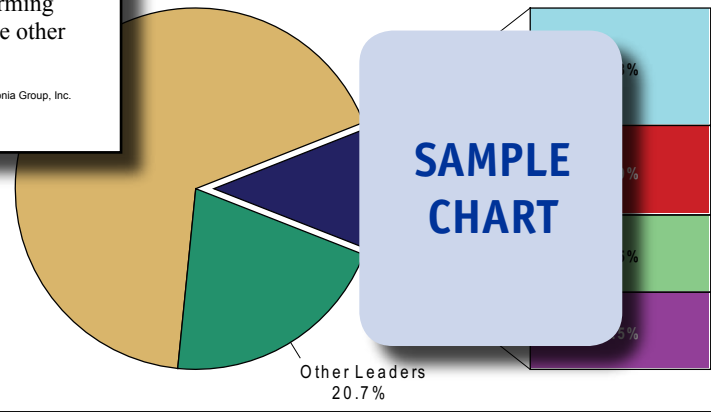
CHINA: WATER TREATMENT PRODUCT DEMAND BY TYPE & MARKET (million dollars)

Item	1998	2003	2008	2013	2018
Resident Population (mil)	1247	1300	1350	1400	1407
\$ water treatment/capita					
Water Treatment Product Demand					
By Type:					
Chemicals					
Corrosion Inhibitors					
Coagulants & Flocculants					
Oxidizers & Biocides					
Other					
Filtration					
Membrane Systems					
Microfiltration					
Reverse Osmosis					
Other					
Disinfection Equipment					
Other					
By Market:					
Industrial					
Municipal					
Other					
% China					
Asia/Pacific Water Treatment Products	4570	6270	10270	14810	21450

**SAMPLE
 TABLE**

CHART VIII-1

WATER TREATMENT PRODUCT MARKET SHARE, 2008 (\$44.6 billion)

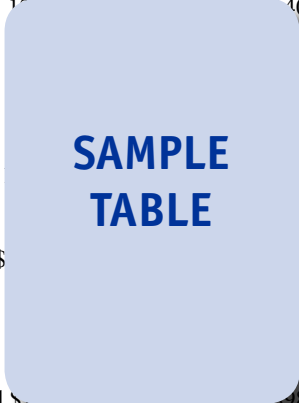


**SAMPLE
 CHART**

Sample Profile, Table & Forecast

**TABLE VI-5
CHINA: MARKET ENVIRONMENT**

Item	1998	2003	2008	2013	2018
Resident Population (mil)	1,210	1,300	1,390	1,480	1,570
GDP/capita	1,000	1,800	2,600	3,400	4,200
Gross Domestic Product (bil 2007\$)	10,000	20,000	30,000	40,000	50,000
Electricity Generation (bil kWh)	10,000	20,000	30,000	40,000	50,000
Water Use (cubic km)	100	150	200	250	300
Gross Fixed Investment (bil 2007\$)	10,000	20,000	30,000	40,000	50,000
Manufacturing Value Added (bil 2007\$)	10,000	20,000	30,000	40,000	50,000
Food, Bev, Tobacco MVA (bil 2007\$)	10,000	20,000	30,000	40,000	50,000
Paper & Board Prdn (mil metric ton)	10,000	20,000	30,000	40,000	50,000
\$ water treatment/000\$ MVA	10,000	20,000	30,000	40,000	50,000
Water Treatment Product Demand (mil \$)	10,000	20,000	30,000	40,000	50,000



COMPANY PROFILES

Toyobo Company Limited
 2-8 Dojima Hama 2-chome
 Kita-ku, Osaka 530
 Japan
 816-6348-3111
<http://www.toyobo.co.jp>

Sales: \$...
 Geograph... Japan 81%, Southeast
 Asia 10%
 Employr...

SAMPLE PROFILE

Key Proc...

Toyobo Company Limited is a Japanese multinational corporation, specializing in the production of synthetic fibers, pharmaceuticals and medical equipment, and functional materials and products. Toyobo operates through five segments: Films & Functional Polymers, Industrial Materials, Life Science, Textiles, and Other Businesses.

The Company competes in the world water treatment products industry via the Life Science segment, which generated sales of \$330 million in FY 2009. The segment manufactures water treatment membranes, bioproducts, pharmaceuticals, and medical equipment and devices. For water treatment applications, Toyobo makes a range of reverse osmosis membrane elements, which are primarily used for seawater and brackish water desalination applications.

Reverse osmosis membranes from the Company are marketed under the HOLLOSEP brand name, and include types for brackish water and seawater desalination applications. HOLLOSEP membranes for brackish water end uses comprise HA types while seawater desalination

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“Demand for water treatment products in China is projected to increase nearly 13 percent per year to \$5.4 billion in 2013. Growth will be rapid in every segment of the water treatment market, although equipment demand is expected to grow more rapidly than the somewhat more established chemical products. The industrial market will be fueled by ...”

--Section VI, pg. 231

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OTHER STUDIES

World Filters

Global demand for filters is forecast to expand 5.1% annually through 2013. Market advances in the developing areas will considerably outpace increases in the US, Western Europe and Japan. Sales of air purification filters will be the fastest growing segment while internal combustion engine and related filters remain the largest. This study analyzes the \$45.5 billion world filter industry, with forecasts for 2013 and 2018 by product, market, world region and for 26 countries. It also evaluates market share and profiles industry players.

#2568 11/2009..... \$6100

World Water Desalination

Global water desalination demand will grow 9.1% annually through 2013. The Africa/Mideast region will remain the dominant market while the Asia/Pacific region grows the fastest. Technologies such as reverse osmosis membranes and multiple-effect distillation will increase market share. This study analyzes the \$8.4 billion world water desalination industry, with forecasts for 2013 and 2018 by technology, product, service, world region and for 17 countries. It also evaluates market share and profiles industry players.

#2523 08/2009..... \$5700

World Membrane Separation Technologies

Global membrane demand is projected to grow 8.6% annually through 2012, driven in part by concerns about water quality and waste stream disposal. Large, developing countries with stressed local water resources will be the fastest growing markets. North America will remain the largest outlet and post strong advances. This study analyzes the \$10 billion world membrane industry, with forecasts for 2012 and 2017 by product, market, world region and for 18 countries. It also evaluates market share and profiles industry players.

#2468 04/2009..... \$5700

Consumer Water Purification & Air Cleaning Systems

US consumer water purification and air cleaning system demand will increase 4.4% annually through 2012. Reverse osmosis and distillation types will be the fastest growing water purification systems. Electrostatic air cleaners will outpace conventional air filtration systems. This study analyzes the \$1.2 billion US purification and cleaning system industry, with forecasts for 2012 and 2017 by technology, product and regional market. It also evaluates market share and profiles industry players.

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

World Water Disinfection

Global water disinfection product demand will grow 7.4% yearly through 2012. Markets in China, India and other developing countries with large industrial sectors will grow the fastest. In mature markets like North America, growth will be driven by upgrades to better performing specialty chemicals. This study analyzes the \$5.2 billion world water disinfection industry, with forecasts for 2012 and 2017 by product, market, world region and for 17 major countries. It also evaluates company market share and profiles industry players

#2412 10/2008..... \$5700

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