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# World Water Disinfection Products

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Industry Study with Forecasts for **2014 & 2019**

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Study #2723 | February 2011 | \$5900 | 353 pages

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*Traditional chemical disinfection technologies will account for most demand, but onsite chemical generation and nonchemical disinfection techniques will register faster growth.*

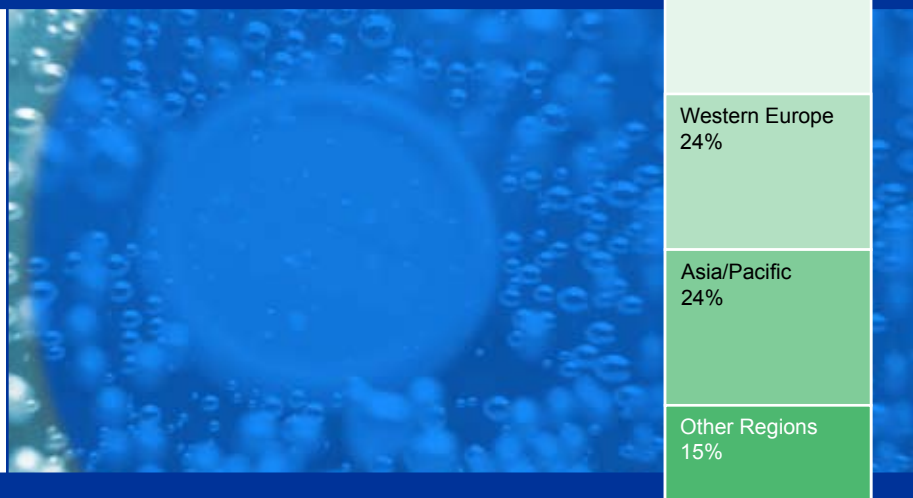
## World demand to increase 7.5% yearly through 2014

World demand for water disinfection products is projected to increase 7.5 percent annually to more than \$8 billion in 2014. Gains will be healthy in essentially every region, although the underlying reasons for these increases will vary between the world's most advanced regions and developing areas. Traditional chemical disinfection technologies will account for a majority of overall demand, but onsite chemical generation and nonchemical disinfection techniques are expected to register faster growth.

## Developed world markets driven by water pollution reduction

In the developed world, gains will be prompted by efforts to reduce the environmental impact of water disinfection. Traditional disinfection can lead to the formation of disinfection byproducts (DBPs) such as trihalomethanes and haloacetic acids when chlorine interacts with organic materials in water supplies. Also, greater emphasis will be placed on more responsible wastewater treatment practices. This emphasis is motivated by the need to improve the quality of wastewater discharged back into the environment for eventual reuse, as well as by initiatives designed to produce reconditioned wastewater suitable for direct nonpotable uses such as irrigation and other "graywater" applications.

## World Water Disinfection Product Demand, 2014 (\$8.2 billion)



## Developing areas focus on improving water treatment rates and quality

In developing areas such as the rapidly industrializing economies in Asia and newer members of the European Union (EU) in Eastern Europe, efforts are underway to draw water treatment rates and quality into line with more advanced regional neighbors, such as Japan and the western EU member states, respectively. Access to water and basic sanitation facilities is generally not deficient in industrial Asia (other than China) and Eastern Europe. But issues such as industrial and municipal wastewater treatment have generally been underem-

phasized in the interest of industrial development and economic modernization. Governments in these areas are looking to rectify these shortfalls. In the world's least developed regions, including much of South Asia and most of sub-Saharan Africa, growth for water disinfection products will be based mainly on extension of access to water supplies in areas where no previous access had existed. Even so, hundreds of millions in these areas and elsewhere will still be without basic supplies of safe water, which is reflective of the small size of these markets (despite huge populations) and suggestive of significant prospects for long-term growth.

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## Sample Text, Table & Chart

### OTHER REGIONS

#### Russia: Water Disinfection Product Demand

water disinfection products per year through 2014 to \$ of the growth registered du global average. Growth is sion, which has proven elu overall economic growth is ongoing concerns and probl in all areas of the economy, especially the energy sector. merous other difficulties have impeded Russia's progress environmental stewardship and improvements to a severel infrastructure.

However, the opportunity for growth in the Russian water disinfection market is substantial, in large part because the country has taken only the most modest steps toward undoing the environmental damage done during the Soviet era, when environmental considerations were at best an afterthought, if not fully disregarded altogether. Chlorine will continue to be the leading water disinfectant chemical in volume terms, but chlorine derivatives will find increased use in municipal, industrial and recreational water treatment applications. Moreover, nonchemical disinfection technologies will continue to expand their foothold in the Russian market.

The upside for water disinfection in Russia has not gone unnoticed by major players in the global water treatment industry. For Kemira has undertaken a number of initiatives to boost its pr the Russian market, including opening a water treatment che in St. Petersburg. Other initiatives in Russia include the con UV plants in St. Petersburg. These will reduce the amount o cal disinfection that is needed to dose the city's water supply reduce the creation of disinfection byproducts

265

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SAMPLE  
TEXT

TABLE VII-12

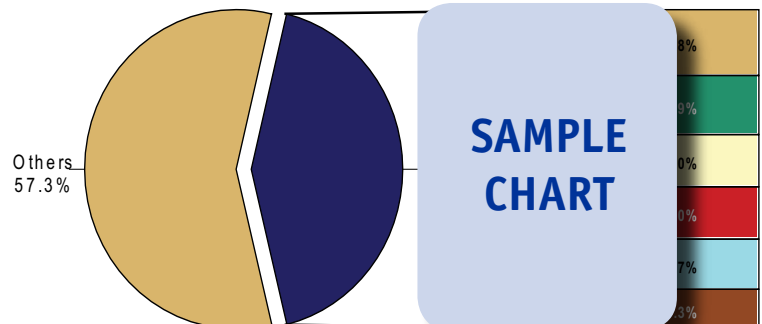
RUSSIA: WATER DISINFECTION PRODUCT DEMAND BY TYPE  
(million dollars)

Item	1999	2004	2009	2014	2019
Resident Population (mil)					
\$ water disinfection/capita					
Water Disinfection Product Demand					
Chemicals:					
Chlorine					
Chlorine Derivatives					
Bromine Derivatives/Other Chem					
Equipment:					
UV					
Chemical Generation					
Ozone & Other Equipment					
% Russia					
East Europe Water Disinfection Deman					

SAMPLE  
TABLE

CHART VIII-1

WORLD WATER DISINFECTION PRODUCT MARKET SHARE  
(\$5.7 billion, 2009)

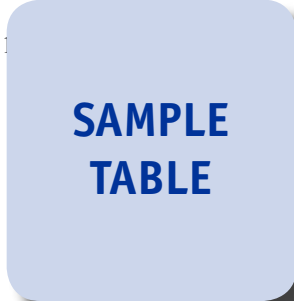


SAMPLE  
CHART

**Sample Profile,  
 Table & Forecast**

**TABLE VII-13**  
**RUSSIA: WATER DISINFECTION MARKETS**  
 (million dollars)

Item	1999	2004	2009	2014	2019
Gross Domestic Product (bil 2008\$)					5
\$ water disinfection/000\$ GDP					0
Water Disinfection Demand					5
Industrial					5
Recreational					8
Municipal:					2
Supply Water					7
Wastewater					5



**COMPANY PROFILES**

**BWT AG**  
 Walter-Simmer-Strasse 4  
 5310 Mondsee  
 Austria  
 43-6232-  
 http://ww

Sales: \$  
 Employr

Key Pro... chemical disinfection  
 systems

**SAMPLE  
 PROFILE**

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. BWT 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 range of disinfection and other water treatment products 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.

**Austria/Germany Segment** -- The Austria/Germany segment, which had sales of \$239 million and employed 1,325 in 2009, consists of BWT's subsidiaries in Austria and Germany. Austria subsidiaries include BWT Austria AG, arcana pool systems GmbH and Aqua Service

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"The fastest growth opportunities for water disinfection products in the Russian market are expected for municipal wastewater treatment, which is almost nonexistent in some areas, and generally inadequate in areas with more developed water infrastructure, such as in Moscow and St. Petersburg. Outside these large metropolitan areas, water supply systems are often not equipped to provide even a minimal level of treatment comparable to the standards commonplace elsewhere on the continent."  
 --Section VII, pg. 266

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**OTHER STUDIES**

**World Aquaculture: Feed, Equipment & Chemicals**

Global demand for aquaculture supplies and equipment will grow 11.6 percent annually through 2014. The Asia/Pacific region will continue to dominate both production and consumption. Aquafeed will remain the largest product segment and be the fastest growing. This study analyzes the world aquaculture supplies and equipment industry, with forecasts for 2014 and 2019 by product, species, world region and for 15 countries. It also evaluates company market share and profiles industry participants.

#2680 ..... October 2010 ..... \$5800

**Industrial & Institutional (I&I) Cleaning Chemicals**

US demand for industrial and institutional (I&I) cleaning chemicals will increase 4 percent annually through 2014. Disinfectants and sanitizers will be the fastest growing type as the food industry faces tighter safety requirements. General purpose cleaners and floor care cleaners will remain the largest segments. This study analyzes the \$8.8 billion US I&I cleaning chemical industry, with forecasts for 2014 and 2019 by market, product and raw material. It also evaluates company market share and profiles industry players.

#2683 ..... September 2010 ..... \$4900

**World Filters**

Global demand for filters is forecast to expand 5.1 percent 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 ..... November 2009 ..... \$6100

**World Water Treatment Products**

Global water treatment product demand will rise 5.7 percent yearly through 2013. Large developing markets such as China and India will grow the fastest. Gains in developed areas will be based on efforts to increase water reuse, improve the aesthetic quality of drinking water and further reduce water contamination. This study analyzes the \$44.6 billion world water treatment product industry, with forecasts for 2013 and 2018 by product, market, world region and for 23 countries. It also evaluates market share and profiles industry players.

#2563 ..... November 2009 ..... \$6100

**World Water Desalination**

Global water desalination demand will grow 9.1 percent 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 ..... August 2009 ..... \$5700

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