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World Water Treatment Products

Industry Study with Forecasts for **2015 & 2020**

Study #2802 | September 2011 | \$6400 | 572 pages



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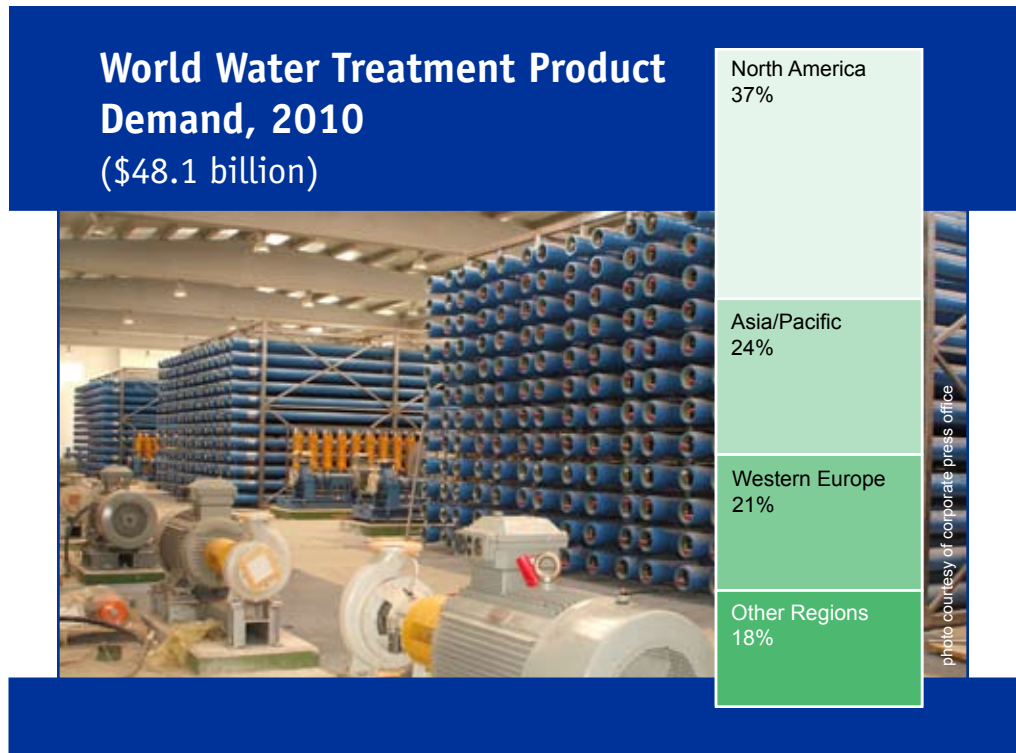
Although growth in water treatment products will be healthy across the globe (spurred by recovery from the down economy), China will remain by far the fastest growing major market.

World demand to rise 6.2% yearly through 2015

World demand for water treatment products is projected to increase 6.2 percent per year to nearly \$65 billion in 2015. Although growth will be healthy across the globe (spurred by recovery from the recent economic downturn), the drivers of growth will vary by region. China will remain by far the fastest growing major market. In just a few short decades, China has gone from being a country in which water treatment was at best an afterthought to being the second largest water treatment market in the world. Nevertheless, growth in China will inevitably slow from the torrid pace set in the early years of the 21st century.

Least developed markets of Asia, Africa to be among the fastest growing

In the most developed markets -- the US, Japan and most of Western Europe -- gains will result from efforts to increase water reuse rates, improve the quality of drinking water, and further reduce the chances of water contamination and environmental damage. Such efforts will boost demand for products such as advanced membrane systems, disinfection equipment and specialty chemicals used in industrial wastewater treatment. In the US and a few other developed countries, demand will also be boosted by increased desalination capacity.



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

In the least developed parts of Asia and Africa, market gains will be among the fastest in the world, but even that robust level of growth will leave several hundred million people without access to safe water or even minimal sanitation facilities. In the large Middle Eastern market, gains will be prompted by continued expansion of desalination capacity in the region, in both the desalination leaders Saudi Arabia, the United Arab Emirates and Kuwait, and in countries such as Algeria and Israel. The expansion of desalination will boost demand for evaporators and membrane systems. Membrane systems are the leading desalination method nearly everywhere except the Persian Gulf.

Sample Text, Table & Chart

OTHER REGIONS

Saudi Arabia: Water Treatment Products Demand

mand for water treatment products in Saudi Arabia is projected to increase to \$2.2 billion in 2015. Gains will be driven by the large increase in population growth and the insufficient supply of water. This will drive demand for desalination products, particularly membrane technologies. The economic growth in the Saudi industrial sector due to demand for chemicals, but prices have softened and it is expected that these industries will recover to a level by 2015.

SAMPLE TEXT

Saudi Arabia has more desalination capacity in place than any other country, and is one of the largest desalination markets. At some point, it is possible that Saudi Arabia's potable water demand will be met entirely via desalination, or nearly so. Although progress toward this objective has been impeded by underfunding of maintenance operations, the state-owned Saline Water Conversion Corporation has planned substantial capacity additions, including some intended for wastewater treatment.

Although thermal desalination techniques are projected to continue to account for a majority of the overall market, Saudi Arabia's membrane segment has grown into one of the largest in the world. Multiple-effect distillation (MED), multi-stage flash (MSF) distillation and reverse osmosis (RO) capacities are all expected to increase, which will boost growth for both the thermal and membrane segments of the market, strengthening demand for evaporators, membranes and chemicals.

The municipal market accounts for a large majority of the desalination market in Saudi Arabia, which contributes significantly to the overall size of the municipal water treatment market. The

351

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TABLE VII-23

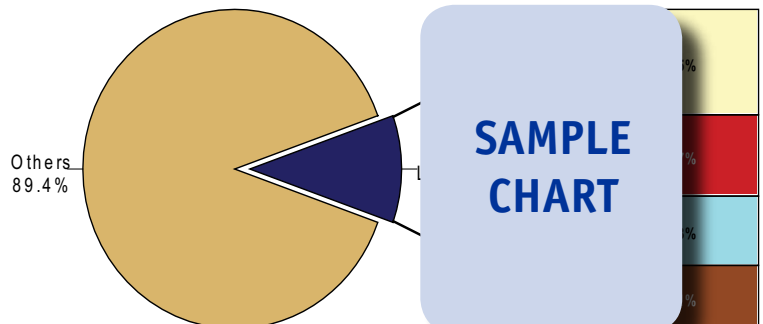
SAUDI ARABIA: MARKET ENVIRONMENT FOR WATER TREATMENT PRODUCTS

Item	2000	2005	2010	2015	2020
Resident Population (mil)	22.2				
GDP/capita	2,000				
Gross Domestic Product (bil 2009\$)	44.9				
Electricity Production (bil kWh)	15.5				
Water Use (bil m3)	9.9				
Gross Fixed Capital Formation (bil 2009\$)	4.4				
Manufacturing Value Added (bil 2009\$)	1.1				
Food, Bev & Tobacco MVA (bil 2009\$)	1.1				
Paper & Board Production (mil metric tons)	5.5				
\$ water treatment/000\$ MVA	9.9				
Water Treatment Demand (mil \$)	15.5				

SAMPLE TABLE

CHART VIII-1

WORLD WATER TREATMENT PRODUCT MARKET SHARE (\$48.1 billion, 2010)



SAMPLE CHART

**Sample Profile,
 Table & Forecast**

COMPANY PROFILES

Hyflux Limited

Hyflux Building
 202 Kallang Bahru
 Singapore 339339
 Singapore
 65-6214-0
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Revenues:
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 east and N
 Employme

Key Products, hollow fiber and tubular membranes, and point-of-use and point-of-entry water purification systems

Hyflux is a water treatment and environmental company that specializes in membrane technologies for the water, industrial manufacturing, specialty materials and energy sectors. The Company operates through three segments: Municipal, Industrial and Others.

The Company participates in the world water treatment products industry through the Municipal segment, which had 2010 revenues of US\$375 million. The segment makes a range of products for water and other fluid treatment applications in the municipal and consumer markets. For water treatment applications, the Company produces hollow fiber and tubular membranes for municipal applications, and point-of-use and point-of-entry water purification systems for household use.

Hollow fiber membranes from Hyflux include KRISTAL and INOCEP products. KRISTAL ultrafiltration membranes are made from a hydrophilic polyethersulfone material and designed for high permeate

**SAMPLE
 PROFILE**

TABLE VII-24

**SAUDI ARABIA WATER TREATMENT PRODUCT
 DEMAND BY TYPE & MARKET
 (million dollars)**

Item	2000	2005	2010	2015	2020
Resident Population (mil)					2
\$ water treatment/capita					3
Water Treatment Demand					5
By Type:					
Chemicals					0
Corrosion Inhibitors					1
Coagulants & Flocculants					1
Oxidizers & Biocides					7
Other					1
Filtration					0
Membrane Systems					0
Disinfection Equipment					0
Evaporators					0
Other					5
By Market:					
Industrial					0
Municipal					0
Other					5
% Saudi Arabia					4
Africa/Mideast Water Treatment Prods 1					50

**SAMPLE
 TABLE**

“Saudi Arabia has more desalination capacity in place than any other country, and is one of the largest desalination markets. At some point, it is possible that Saudi Arabia’s potable water demand will be met entirely via desalination, or nearly so. Although progress toward this objective has been impeded by underfunding of maintenance operations, the state-owned Saline Water Conversion Corporation has planned substantial capacity additions, including some intended for wastewater treatment.”
 --Section VII, pg. 351

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OTHER STUDIES

Filters

This study analyzes the US filter industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by media (e.g., paper, fabric, activated carbon), product (e.g., fluid filters, internal combustion engine filters, air filters) and market (e.g., motor vehicles, utilities, consumer). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.
 #2801 October 2011 \$5100

World Water Desalination

World demand for water desalination products and services will grow 9.3 percent annually through 2015. The Africa/Mideast region will remain the dominant market, while the Asia/Pacific region grows the fastest. Reverse osmosis and other membrane-based technologies will continue to gain market share over thermal methods. This study analyzes the \$8.6 billion world water desalination industry, with forecasts for 2015 and 2020 by technology, product, service, world region and for 17 countries. The study also evaluates company market share and profiles industry players.
 #2782 July 2011 \$5900

World Membrane Separation Technologies

Global demand for membranes is projected to rise 9.0 percent annually through 2015. The BRIC countries and others with large, developing industrial bases and stressed local water resources will see the fastest growth. The US and China combined will account for nearly half of market gains between 2010 and 2015. This study analyzes the \$12.6 billion global membrane industry, with forecasts for 2015 and 2020 by product, market, world region and for 34 countries. The study also evaluates company market share and profiles industry participants.
 #2755 June 2011 \$6100

Filters in China

Demand for filters in China is projected to grow 13.5 percent annually through 2014, supported by rapid growth in transportation equipment production and stocks, and by energy conservation and emission reduction regulations. Internal combustion engine filters will remain the dominant product segment and will post the strongest gains. This study analyzes the 35.2 billion yuan filter industry in China, with forecasts for 2014 and 2019 by type and market. The study also evaluates company market share and profiles 36 industry participants.
 #2740 March 2011 \$5300

World Water Disinfection Products

World demand for water disinfection products will increase 7.5 percent through 2014. In the developed world, gains will be prompted by efforts to reduce the environmental impact of water disinfection. In developing areas, efforts are underway to increase water treatment rates and quality up to advanced country standards. This study analyzes the \$5.7 billion world water disinfection product industry, with forecasts for 2014 and 2019 by product, market, world region and for 20 countries. It also evaluates company market share and profiles industry participants.
 #2723 February 2011 \$5900

About The Freedonia Group

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