



World Water Infrastructure Equipment

Industry Study with Forecasts for **2016 & 2021**

Study #2881 | May 2012 | \$6100 | 370 pages

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Approximately one billion people lack access to reliable water supply and sanitation; massive investment is needed to expand or replace antiquated or inadequate water delivery systems.

World demand to increase 6.5% yearly through 2016

World demand for water infrastructure equipment is projected to increase 6.5 percent per year to \$101.7 billion in 2016. Advances will result from two key factors: in developing nations, access to water supply and sanitation will be increased; in developed nations, aging water infrastructure will need repair and upgrade. For example, many current water systems across the world have pipelines over 50 years old, leading to increased main breaks. These trends will benefit water infrastructure demand for all major products such as pipe, pumps, valves, and meters.

Water supply expansion to drive gains in less developed areas

In less developed nations, gains in water infrastructure equipment demand will be prompted by expansion of water supply services, access to which in many countries remains considerably low. In the least developed parts of Asia and Africa, market gains will continue, but even a robust level of growth will leave several hundred million people without access to safe water or even minimal sanitation facilities. Water infrastructure construction in developing nations has been hampered by a lack of funding. However, government and nongovernmental organizations are increasing their focus on the issue of water manage-

World Water Infrastructure Equipment Demand, 2016 (\$101.7 billion)



ment, which will provide opportunities for equipment suppliers.

Upgrades and repairs to define developed markets

In most developed markets -- particularly the US -- gains will result from efforts to upgrade and repair aging sewer and water pipe networks. In addition, rising regulatory standards will also boost water infrastructure spending. However, funding will continue to be the key issue facing the industry. Governments, faced with budgetary limits, have historically neglected water infrastructure in favor of higher profile projects. Water users in many nations are faced with rising fees, which will likely continue to rise.

Plastic pipe, meters to post solid gains

Among products, plastic pipe will post strong gains through 2016, continuing to steadily take market share from other pipe materials. Rising demand for plastic pipe will be driven by its low cost compared to metal or concrete. Meters -- particularly smart meters -- will post solid gains due to suppliers' attempts to reduce operational costs and leakage. Replacement demand for pumps and valves will benefit from the wear experienced during the continual operation of water systems.

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**Sample Text,
 Table & Chart**

ASIA/PACIFIC

India: Outlook & Suppliers

Demand for water infrastructure equipment in India is projected to increase through 2016 to \$5.6 billion. Gains will benefit from efforts to improve water infrastructure, which is expected to benefit from a growing economy. This will create funding opportunities and strains on India's water infrastructure. Industrial output will increase for water. Climate change is becoming an increasing concern. Melting of the western Himalayas will make rainfall in parts of the subcontinent more variable. The country will seek to increase its amount of water storage, which will require the use of water delivery equipment such as pipe and valves.

India's water infrastructure equipment industry consists of many domestic and foreign manufacturers. Most locally based pipe producers are small or mid-sized companies, with limited product offerings. A few large suppliers are also headquartered in India, including Finolex, Jain Irrigation Systems, Ori-Plast, and Supreme Industries. Finolex, for example, makes PVC pipe at four factories in Ratnagiri and Pune. Local participants in the pump segment include companies like Kaushal Industries and Kiwi Pumps. Often, these companies are also involved in the manufacture of other products. Nearly all of the leading foreign manufacturers operate production facilities in India, including Alfa Laval, Crane, Flowserve, Grundfos, KSB, Pentair, SPX, Sulzer, and Wilo.

Local producers of water infrastructure valves include Itron. Valves. A few foreign companies have valve manufacturing facilities in India, including Alfa Laval and Flowserve. Leading suppliers to India are Anand Water Meter, Elster, and Itron.

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**SAMPLE
 TEXT**

TABLE VI-8

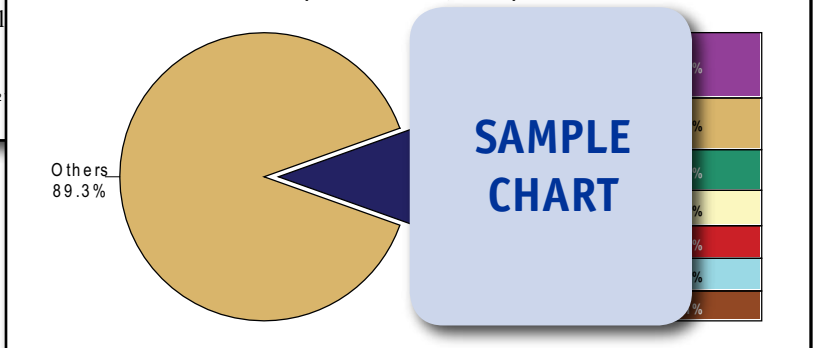
INDIA: WATER INFRASTRUCTURE EQUIPMENT DEMAND BY TYPE (million dollars)

Item	2001	2006	2011	2016	2021
Resident Population (mil)					
\$ equipment/capita					
Water Infrastructure Equipment					
Pipe:					
Plastic					
Other					
Pumps					
Valves					
Meters & Other					
% India					
Asia/Pacific Water Infrastructure Equip					

**SAMPLE
 TABLE**

CHART VIII-1

WORLD WATER INFRASTRUCTURE EQUIPMENT MARKET SHARE (\$74.2 billion, 2011)



Sample Profile, Table & Forecast

TABLE VI-7
**INDIA: MARKET ENVIRONMENT
FOR WATER INFRASTRUCTURE EQUIPMENT**

Item	2001	2006	2011	2016	2021
Resident Population (mil)	1	1	1	1	1
GDP/capita					
Gross Domestic Product (bil 2010\$)					
Electricity Production (bil kWh)					
Water Use (cubic km)	6	6	6	6	6
Gross Fixed Capital Formation (bil 2010\$)					
Manufacturing Value Added (bil 2010\$)					
\$ equipment/capita					
\$ equipment/000\$ fixed investment					
\$ equipment/000\$ MVA					
Water Infrastructure Equipment (mil \$)					
Supply Water					
Wastewater					

**SAMPLE
PROFILE**

COMPANY PROFILES

Aristovolos G. Petzetakis SA

146 Syggrou Avenue
 17671 Kallithea, Athens
 Greece
 210-909
 http://www

Sales: \$
 Employe

Key Products: polypropylene pipes

Aristovolos G. Petzetakis (Petzetakis) is manufacturer of plastic pipes and hoses. The Company markets its products to customers worldwide.

The Company is active in the world water infrastructure equipment industry via the production of polyvinyl chloride (PVC), polyethylene and polypropylene pipes used in infrastructure, industrial and agricultural water systems. These products can also be used in mining, telecommunications, natural gas distribution, and other applications.

Infrastructure products include pipes for potable water, irrigation and sewage transmission end uses. For potable water transmission applications, Petzetakis makes HYDROTHEN polyethylene pipes. These pipes are blue in color and used for underground installation in pressurized water lines. Other waters supply pipes made by the Company include HELIDUR pressure lines, which are used primarily in irrigation systems. Among sewage pipes manufactured by Petzetakis are HELIDUR SUPER PIPE high density polyethylene (HDPE) types that feature corrugated exteriors and smooth interiors to provide high hydraulic flow properties. The Company also makes HELIDUR PVC

“Demand for water infrastructure equipment in India reached \$3.3 billion in 2011. As in China, growth reflects the ongoing industrialization of the country. Efforts to expand water supply and sanitation access have boosted demand. However, the nation is still very far from realizing its potential, as limited access to funding has hampered efforts.”
 --Section VI, pg. 159

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OTHER STUDIES

Large Diameter Pipe

US large diameter pipe demand will rise 6.2 percent yearly through 2016 to 197 million feet. Storm and sanitary sewers will remain the leading market, while drainage and water transmission will grow the fastest. Concrete pipe will rebound from a depressed base to be the fastest growing material, while HDPE will surpass steel as the most common type. This study analyzes the 146 million foot US large diameter pipe industry, with forecasts for 2016 and 2021 by market and material. The study also evaluates company market share and profiles industry players.

#2974December 2012 \$5100

Plastic & Competitive Pipe

US demand for pipe is expected to grow 6.2 percent per year to \$50.1 billion in 2016. Plastic pipe will experience the fastest growth, led by PVC. Concrete and ductile iron pipe will lead gains among other material types. Steel pipe will remain the leading pipe material in value terms, based on its dominance in the oil and gas market. This study analyzes the \$37 billion US pipe industry, with forecasts for 2016 and 2021 by market, material and resin. The study evaluates company market share and profiles industry participants.

#2958October 2012 \$5300

Smart Meters

US smart meter product and service demand is projected to increase 11.3 percent annually to \$4.4 billion in 2016. Gains will be driven by the rising penetration of smart meters, particularly advanced metering infrastructure (AMI) products. The rising share of smart meters in use will support demand for parts and services. This study analyzes the \$2.6 billion US smart meter product and service industry, with forecasts for 2016 and 2021 by product, market and US geographic region. The study also evaluates company market share and profiles industry participants.

#2844February 2012 \$4900

Water & Wastewater Pipe

US demand for water and wastewater pipe is expected to rise 8.2 percent per year to \$17.8 billion in 2016. The building construction market will lead gains as it rebounds from recent declines, followed by the municipal market. Plastic will be the fastest-growing pipe material as it continues gaining market share over competing products. This study analyzes the \$11.9 billion US water and wastewater pipe industry, with forecasts for 2016 and 2021 by market, application and product. The study also evaluates company market share and profiles industry players.

#2848February 2012 \$4900

World Industrial Valves

Global demand for industrial valves will rise 5.4 percent annually through 2015. Growth will be driven by continuing robust gains in the Asia/Pacific region, as well as strong recovery in the US and West European markets. Automatic valves will outpace conventional types. The oil and gas industry will see strong growth in valve demand. This study analyzes the \$71.8 billion world industrial valve industry, with forecasts for 2015 and 2020 by product, world region and for 34 major countries. The study also evaluates company market share and profiles industry competitors.

#2809November 2011 \$5900

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