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Water Treatment in China

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

Study #2920 | September 2012 | \$5400 | 286 pages

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Share in China, 2010 186

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Demand for nonchemical water treatment in China will exhibit healthy growth through 2015, benefiting from advanced technologies and more stringent treatment standards.

Demand to post double-digit gains through 2015

The market for water treatment products in China is expected to grow more than 10 percent per year to 46.6 billion yuan in 2015, posting one of the fastest growth rates among national markets. Advances will be driven primarily by the continued strong growth in manufacturing, power generation, and other industries in China. Government efforts to increase access to fresh water and improve the poor condition of surface water sources, which supply most of the country's water needs, will also spur demand for water treatment chemicals, equipment, and supplies.

After decades of rapid economic growth, the Chinese government's lack of oversight on water treatment has led to significant environmental concerns, such as surface water pollution and regional water shortages. The Twelfth Five-Year Plan has set several goals for water conservation and the prevention of water pollution, that require massive spending on water supply, wastewater treatment, and recycling programs in significant water use segments, boosting demand for water treatment products.

Industrial sector to remain dominant, exhibit robust growth

Demand for water treatment products in the industrial sector is projected to post double-digit gains through 2015, ac-

Water Treatment Demand in China by Type, 2015 (46.6 billion yuan)



counting for more than half of the water treatment market in China. Despite comparatively slow growth in industrial water usage -- 2.4 percent per annum through 2015 -- demand for water treatment products in essentially every industrial market will be robust due to efforts to use water more efficiently and treat water more intensively. Greater emphasis on water recycling and waste reduction in industrial applications will intensify the need for more assertive treatment. Growth in the municipal water treatment market will be due in large part to the continued expansion of the nation's water supply and wastewater treatment infrastructure. More municipal water infrastructure is needed to serve a growing urban population. Water supply

and wastewater treatment facilities are still rare in rural areas.

Nonchemical equipment demand to rise fastest

Water treatment chemicals will remain the largest product category, with sales expected to grow 8.7 percent annually through 2015. However, benefiting from advanced technologies and more stringent treatment standards, demand for nonchemical equipment, such as filtration, membranes, and disinfection equipment, will experience healthier growth. Nonchemical disinfection equipment is expected to post the fastest growth, with demand projected to climb 20 percent per year through 2015.

Sample Text, Table & Chart

MARKETS

Industrial

Demand for water treatment products in industrial market is projected to increase by 8 billion in 2015. Advances will be driven by increasing demand on water recycling and waste reduction as part of the government's concerted national effort to improve water quality in China. The industrial output in China is expected to continue its strong growth forecast period. During this period, industrial activity is not only expanding in volume but also in quality. In industrial water treatment, the water treatment industry will also match advances in technology and standards of more developed countries. These two developments -- expansion of treatment and modernization of treatment technology -- will cause growth in the Chinese industrial water treatment market faster than anywhere else in the world.

In recent decades, the government's efforts to increase industrial production and modernize the nation's economy have been largely successful. However, this economic expansion came at considerable cost, including significant damage to the environment, as management of the water supply -- both in terms of volume of water use and quality of treatment for water supply and wastewater -- was deficient. Several water contamination accidents caused by industrial waste across the country have set off calls for better water safety in China. The most recent example is the cadmium pollution of Long River in Guangxi in January 2012.

Although the government has put forth a number of initiatives designed to improve the nation's water supply -- including directives for treating wastewater more carefully and reining in wasteful water usage -- there is still significant room for improvement in all counts. Troublesome source water quality still challenges water users, and wastewater treatment rates are still far below more developed nations. Continued improvement in these key

40

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**SAMPLE
TEXT**

TABLE III-3

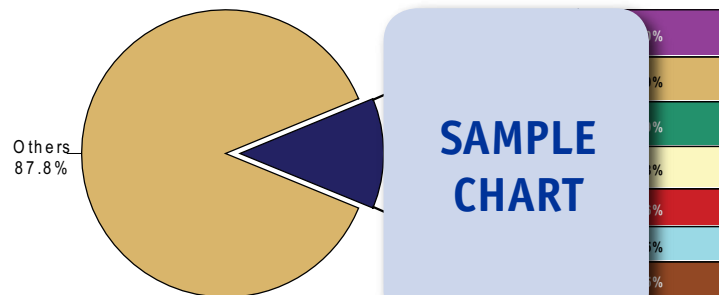
PULP & PAPER MARKET FOR
WATER TREATMENT PRODUCTS IN CHINA
(million yuan)

Item	2000	2005	2010	2015	2020
Paper & Board Production (mil metric tons)					
¥ water treatment/metric ton paper					
Water Treatment Product Demand					
Chemicals:					
Coagulants & Flocculants					
Corrosion Inhibitors					
Oxidizers & Biocides					
Other Chemicals					
Membranes					
Filtration					
Deionization					
Other					
% pulp & paper					
Industrial Water Treatment Demand					

**SAMPLE
TABLE**

CHART V-1

WATER TREATMENT PRODUCT MARKET SHARE IN CHINA
(28.5 billion yuan, 2010)

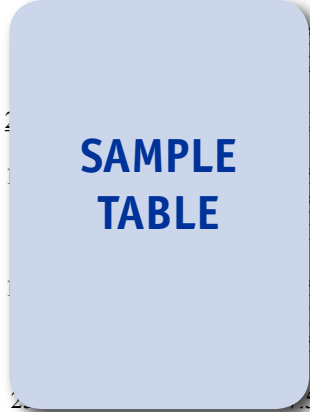


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-8
WATER TREATMENT FILTRATION PRODUCT DEMAND
IN CHINA BY TYPE & MARKET
 (million yuan)

Item	2000	2005	2010	2015	2020
Nonagricultural Water Use (bil cu m) ¥ filtration/000 cubic meter water					
Filtration Product Demand					
By Type:					
Sand					
Cartridge					
Other					
By Market:					
Municipal					
Industrial					
Other					
% filtration					
Water Treatment Product Demand	8130	16414	28540	46600	72300



COMPANY PROFILES

Wujin Fine Chemical Factory Company Limited
 Hengshanqiao Town
 Changzhou, Jiangsu 213119
 China
 86-519-8513-
 http://www.wj

SAMPLE PROFILE

Annual Sales: company, 1/12)
 Employment:
 Key Products: ves, copper
 corrosion inhi

Wujin Fine Chemical Factory (WFCF) is a leading water treatment chemicals manufacturer in China. The privately held company operates a production site in Changzhou, China. In addition, the Company's Uniphos Incorporated subsidiary markets the Company's products in the US.

The Company is involved in the Chinese water treatment products industry through the manufacture of oxygen scavengers, biocides, preservatives, copper corrosion inhibitors, and phosphonates. Among WFCF's oxygen scavengers are XF-701 and XF-702 types, both of which can be used to prevent corrosion in boiler feed systems. Biocides and preservatives made by the Company are based on a range of chemicals, including bronopol, glutaraldehyde, isothiasolinone, and 2,2-dibromo-3-nitrilo-propionamide. A specific copper corrosion inhibitor is the XF-2100 tolyltriazole sodium salt, which is suitable for use in industrial water treatment applications. Among WFCF's phosphonates is the XF-210 model that can be utilized to control calcium carbonate scale. WFCF also manufactures phosphonates that are suitable for use as sequestering agents. A representative polymer from WFCF is the XF-322

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"Demand for sand filtration systems for water treatment in China is projected to increase 8.8 percent annually to ¥6.2 billion in 2015. As the most established filtration type used for water treatment in China, sand filtration accounted for more than half of total filtration demand in China in 2010. Sand filtration will register slower growth than the overall average for filtration products, but growth will still be healthy, due to the expansion of the water supply and treatment infrastructure."
 --Section IV, pg. 147-8

OTHER STUDIES

World Water Disinfection Products

World demand for water disinfection products will rise 5.5 percent annually to \$7.7 billion in 2016. China and the Asia/Pacific and Africa/Mideast regions will be the fastest growing markets. A shift in the product mix from elemental chlorine towards higher value chemicals and advanced technologies will continue. This study analyzes the \$5.9 billion world water disinfection product industry, with forecasts for 2016 and 2021 by product, market, world region and for 16 countries. The study also evaluates company market share and profiles industry participants.

#2992 March 2013..... \$6100

World Water Infrastructure Equipment

World demand for water infrastructure equipment will rise 6.5 percent per year to \$101.7 billion in 2016. In less developed nations, gains will be prompted by expansion of water supply services. In most developed nations, gains will result from upgrades and repairs to aging sewer and water pipe networks. This study analyzes the \$74.2 billion world water supply equipment industry, with forecasts for 2016 and 2021 by product, application, world region and for 22 major countries. The study also evaluates company market share and profiles industry competitors.

#2881 May 2012..... \$6100

World Filters

Global demand for filters is projected to rise 7.6 percent annually to \$65.9 billion in 2015. China, India, Indonesia and other countries with large, developing industrial bases and nascent regulatory schemes will see the fastest growth. Manufacturing will be the fastest growing market, while transportation equipment remains the largest. This study analyzes the \$45.6 billion world filter industry, with forecasts for 2015 and 2020 by product, market, world region and for 23 countries. The study also evaluates company market shares and profiles industry players.

#2856 March 2012..... \$6300

World Water Treatment Products

World demand for water treatment products will rise 6.2 percent annually through 2015. China will remain by far the fastest growing major market. In the US, Japan and Western Europe, gains will favor advanced membrane systems, disinfection and desalination equipment, and industrial wastewater treatment chemicals. This study analyzes the \$48.1 billion world water treatment product industry, with forecasts for 2015 and 2020 by product, market, world region and for 30 countries. The study also evaluates company market share and profiles industry players.

#2802 September 2011..... \$6400

World Water Desalination

World demand for water desalination products and services will rise 9.3 percent per year 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

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