World Water Disinfection Products

Industry Study with Forecasts for 2016 & 2021

Study #2992 | March 2013 | $6100 | 388 pages
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Increasing water quality and wastewater treatment standards will continue to cause a switch from elemental chlorine in favor of higher value chemicals and advanced treatment technologies.

US demand to rise 5.5% annually through 2016

World demand for water disinfection products is projected to increase 5.5 percent per year to $7.7 billion in 2016. Significant changes are occurring around the world for a number of reasons. There is continued concern about disinfection byproducts (DBPs), many of which are known or suspected carcinogens. Outbreaks of waterborne illness continue to occur even in developed countries as pathogens such as Cryptosporidium and Giardia lamblia are resistant to chlorine. Heightened security and anti-terrorism measures have led to increased regulatory costs. Finally, standards for water quality and wastewater treatment around the world are tightening -- including pressure to treat wastewater for reuse or resupply of source waters.

The net result of these factors has been a switch from elemental chlorine in favor of higher value chemicals and advanced treatment technologies. While there is considerable regional variation in the degree to which chlorine alternatives are favored, sodium hypochlorite and hypochlorite generators, UV equipment, and ozone equipment will be the main beneficiaries of these changes. In addition to environmental advantages, growth in the use of equipment will be spurred by technological improvements and reduced costs, both of which have made these alternatives more attractive options. However, chlorine will remain important -- especially in the developing world.

Municipal market seeing biggest shift in product mix

Growth in the industrial market will accelerate due to improving levels of manufacturing activity, particularly in the large US market. Generally, industrial users favor high-end chemicals and nonchemical disinfection techniques, but chlorine and other commodities have a large presence in industrial markets in developing countries. In those areas, users will increasingly choose products better suited for such processes. The recreational market is dominated by a handful of countries -- namely the US, Brazil, Spain, France, Germany, Italy, Australia, South Africa, and Mexico. While chemicals will continue to account for most recreational water treatment, saltwater chlorine generators and ozone equipment are increasing their market presence, as they provide improved water quality.

The most dramatic changes in product mix are occurring in the municipal market. This trend is led by the US, which is pushing to replace chlorine gas. Around the world, municipal water treatment systems are reviewing their disinfection choices to determine the best technology. In developing areas, this includes efforts to expand safe water supplies. Across the board, wastewater disinfection will post above average gains as operators improve on treatment techniques in developed areas and expand them in developing regions.
The municipal segment is the fastest growing portion of the water disinfection market in India. In some instances, growth in the municipal market will be driven by upgrades to existing systems, including a shift in some instances away from commodity chemicals to higher value disinfection technologies. But for the most part, advances will be boosted by the overall expansion of the country’s water infrastructure and improvements to the methods by which water is treated in India. Portions of the Indian population will gain access to improved water supplies, which will boost demand for chlorine and other disinfection products, including sodium hypochlorite. Calcium hypochlorite is used in smaller water systems. In the past few decades, the country has made remarkable progress toward universal access to water in basic terms. But advances in the operation and maintenance of the water infrastructure have generally not kept pace, leading to lower quality of service. Moreover, wastewater treatment, which is seriously deficient in most large cities and nearly nonexistent in most of the rest of the country, will expand at a rate well above the overall average. Even with this impressive growth, there will still be considerable potential for additional growth in the Indian municipal water disinfection segment.

Although it is appreciable, India’s industrial sector is less well developed than that in many other countries. As a result, the industrial water disinfection segment does not account for as large a share of the overall Indian market as it does in many countries with significant levels of industrial activity. India does have several industries that are substantial markets for water disinfection products, including food and beverage processing and chemical processing.

The recreational segment in India is insignificant. The artisanal pool and spa market is small, and is for the most part not sufficiently affluent to support a significant recreational pool and spa segment, although an emerging middle class is opening up new opportunities.  

### MARKETS

#### India: Markets

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Sales: $6100  
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Key Products: ultraviolet light and ozone generation systems, chlorinating kits and systems, and chlorine dioxide generation systems  

BWT develops and produces water treatment products and systems for residential, commercial, industrial, and swimming pool applications. In addition, the Company develops fuel cell technologies and products. BWT operates in five geographic segments: Scandinavia, Italy/Spain, Austria/Germany, France/Benelux/UK, and Switzerland/Others. In November 2012, Aquivest GmbH (Germany) acquired a 31.13 percent stake in BWT. Aquivest plans to complete the acquisition of the remaining shares of the Company by February 2013.  

The Company participates in the world water disinfection industry via all five segments. Through these segments, BWT manufactures a variety 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. Among the products from these segments are such water disinfection offerings as ultraviolet (UV) light and ozone generation systems, chlorinating kits and systems, and chlorine dioxide generation systems. Production activities for these segments are conducted primarily in Austria, Germany, France, and Switzerland.  

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“Demand for water disinfection products in India is projected to increase nearly 14 percent per year through 2016 to $215 million, among the fastest growth rates in the world. Gains will be strong due to continuing efforts to improve the country’s water infrastructure, which remains inefficient and incomplete. However, unlike many areas in which regulatory requirements are driving fuller compliance with disinfection standards, India’s drinking water quality standards are primarily voluntary.”  

--Section VI, pg. 211
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