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# World Water Treatment Equipment

Industry Study with Forecasts for **2017 & 2022**

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**The Freedonia Group**

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

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*Gains in developing areas will be supported in part by improved access to treated drinking water and sanitation facilities, particularly through greater use of filtration and membrane systems.*

## World demand to rise 6.9% annually through 2017

World demand for water treatment equipment is expected to grow 6.9 percent per year to \$53.4 billion in 2017. Developing parts of the world -- the Asia/Pacific and Africa/Mideast regions, Eastern Europe, and Central and South America -- are expected to show strong growth, with gains supported by improved access to treated drinking water and sanitation facilities, particularly through greater use of filtration and membrane systems. Expanding manufacturing and industrial activities requiring water treatment equipment such as membrane systems and disinfection equipment will also promote growth in these regions. More modest gains are expected in the mature markets for water treatment equipment -- North America, Western Europe, and Japan. Demand for membrane systems and disinfection equipment in these regions will be supported by continued efforts to reduce chemical use by replacing chlorine and other chemicals with water treatment equipment, and by an ongoing rebound in manufacturing output after the 2009 global recession.

## Manufacturing market to see fastest growth

The manufacturing market for water treatment equipment is expected to show the fastest gains through 2017. Continued improvement in manufacturing output after the economic slowdown

## World Water Treatment Equipment Demand, 2017 (\$53.4 billion)



Asia/Pacific

North America

Western Europe

Other Regions

in the 2007-2012 period, combined with ever-increasing standards for supply and process water quality, are expected to contribute to rising demand for water treatment equipment in applications such as pharmaceuticals processing and food and beverage production. Additionally, many manufacturers in both developed and developing regions are paying more attention to the reuse of water and are increasing the level of treatment manufacturing wastewater receives, due to global concerns about fresh water availability and the environmental impacts of poorly-treated wastewater.

Gains in the municipal market, while slower than those in the manufacturing market, will be supported by the in-

creased use of products such as disinfection equipment, membrane systems, and activated carbon systems to improve drinking water and wastewater quality in developed regions. Developing regions will contribute to growth by increasing investment in all types of municipal water treatment equipment as access to water treatment infrastructure improves. Among the remaining markets for water treatment equipment, demand will rise as the quality of supply water and wastewater in the power generation and mining markets, respectively, continues to be a source of concern and as residential users, particularly in developing regions, adopt the use of point-of-entry water treatment systems in homes and offices.

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 Table & Chart**

**OTHER REGIONS**

**Saudi Arabia: Water Treatment Equipment**

Demand for water treatment equipment in Saudi Arabia is expected to rise over the next five years, reaching \$1.2 billion in 2017.

One of the main drivers of this growth is the increasing use of desalination equipment in the country's coastal areas. Due to the abundant financial support from the government, the water treatment equipment market is expected to grow at a steady pace.

Saudi Arabia has a high capacity in place for water treatment equipment, but there is still a need for additional capacity in some areas. The market is expected to grow between 2012 and 2017, with a significant increase in demand for membrane-based desalination equipment at some point. Saudi Arabia's water treatment equipment market is expected to grow through desalination, but this growth has been impeded by the high cost of desalination. The Saudi Water and Sewerage Corporation has announced plans for capacity additions, which is expected to drive the market forward.

Demand for water treatment equipment is expected to rise 9.2 percent per year to \$1.2 billion in 2017. Membrane systems are primarily used in the country's desalination facilities, although they also see use in its municipal wastewater and industrial water treatment markets. Going forward, demand for membrane systems is expected to grow at a slower pace than demand for thermal desalination technologies, as many of the newer desalination facilities will be using multi-stage flash distillation.

Filtration equipment comprises a smaller than average share of total water treatment equipment demand in the Saudi market. Filtration equipment is often used in the pretreatment of salt or brackish water in membrane-based desalination facilities, and growth prospects for this equipment will be limited by the slowdown in construction of desalination plants. Disinfection equipment represents a very niche in the Saudi market for water treatment equipment, although it is expected to grow at a steady pace.

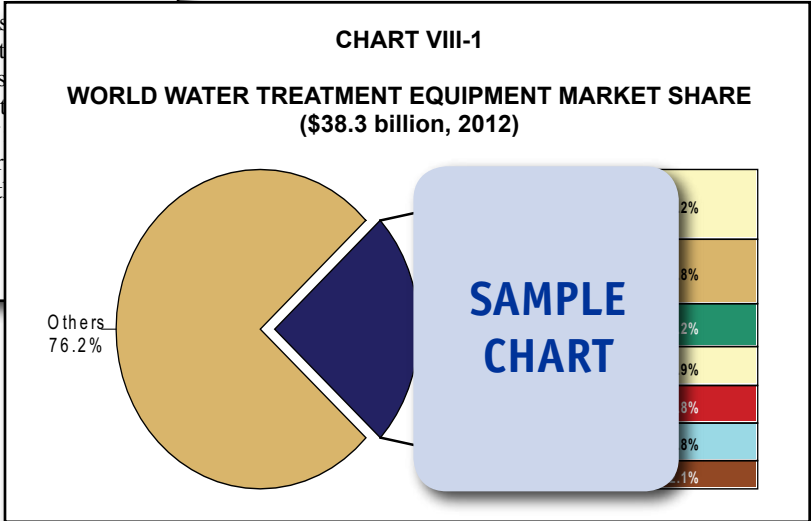
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**TABLE VII-15**  
**SAUDI ARABIA:**  
**WATER TREATMENT EQUIPMENT DEMAND BY MARKET**

Item	2002	2007	2012	2017	2022
Resident Population (mil persons)					
\$ GDP/capita					
Gross Domestic Product (bil 2011\$)					
Electricity Production (bil kWh)					
Water Use (bil m3)					
Gross Fixed Capital Form (bil 2011\$)					
Manufacturing Value Added (bil 2011\$)					
Food & Beverage MVA (bil 2011\$)					
\$ water treatment equip/000\$ GDP					
Water Treatment Equip Demand (mil \$)					
Municipal					
Manufacturing					
Other Markets					

**SAMPLE TEXT**

**SAMPLE TABLE**



**SAMPLE CHART**







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**World Water Treatment Chemicals**

This study analyzes the world water treatment chemical industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by product (e.g., corrosion and scale inhibitors, biocides, coagulants and flocculants, pH adjusters), market (e.g., manufacturing, municipal, power generation, mining), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3122 .....January 2014 ..... \$6300

**World Consumer  
Water Treatment Systems**

This study analyzes the world consumer water treatment system industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by type (point-of-entry, point-of-use), aftermarket component (e.g., filters, membranes), technology (e.g., conventional filtration, reverse osmosis, distillation), world region, and for 21 countries. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#3066 .....January 2014 ..... \$6100

**Consumer Water &  
Air Treatment Systems**

US demand for consumer water and air treatment systems will rise 6.9 percent yearly to \$2.3 billion in 2017. Whole-house air treatment systems will be the fastest growing segment, while point-of-use water treatment systems will remain the largest. Water filters and membranes will remain the largest consumables category. This study analyzes the \$1.6 billion US consumer market for water and air treatment systems, with forecasts for 2017 and 2022 by technology, product, and region. The study also evaluates company market share and profiles industry players.

#3032 ..... May 2013 ..... \$5300

**World Membrane  
Separation Technologies**

World demand for membranes will rise 9.2 percent yearly to \$25.7 billion in 2017. Water treatment will remain the top market and will benefit from expansions or upgrades of water treatment infrastructures and a rebound in manufacturing. BRIC and other countries with large, developing industrial bases and stressed water resources will lead gains. This study analyzes the \$16.5 billion global membrane industry, with forecasts for 2017 and 2022 by product, market, world region and for 21 countries. The study also evaluates company market share and profiles industry players.

#3006 ..... May 2013 ..... \$6300

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