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World Membrane Separation Technologies

Industry Study with Forecasts for **2019 & 2024**

Study #3325 | September 2015 | \$6500 | 499 pages

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INDUSTRY STRUCTURE

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Growth will be driven by more stringent industrial purity requirements, scarce freshwater resources in the water and wastewater treatment markets, and increasing use of desalination to produce drinking water.

World demand to rise 8.5% annually through 2019

World demand for membranes is forecast to rise 8.5 percent annually to \$26.3 billion in 2019. Rising output from key industries, including food and beverages and pharmaceuticals, will promote growing demand as membranes are used to meet increasingly stringent purity requirements. Scarce freshwater resources will support gains in the water and wastewater treatment markets. Desalination facilities will produce an increasing share of drinking water supplies, particularly in arid regions such as the Southwestern United States, the Middle East, and parts of the Mediterranean. Industrial users will also expand their efforts to reclaim and reuse wastewater in response to rising costs associated with the disposal of wastewater and the purchase of fresh water.

Pharmaceutical/medical market to grow the fastest

Together, water and wastewater treatment are the most well-established end uses for membranes. Because of the membranes' importance in desalination, water purification, and water recovery, the water and wastewater treatment markets will together continue to account for nearly half of global membrane demand and will offer sustained opportunities for growth.

The food and beverage processing market for membranes is projected to

World Membrane Demand (\$26.3 billion, 2019)



show healthy growth, as membranes are increasingly used to purify ingredients and finished products. Increasing consumption of processed food and beverage products in developing countries will contribute to gains in this market. The pharmaceutical and medical market will be the fastest growing major market for membranes through 2019, driven by increasing purity standards in developing countries and expanding medical applications for membranes.

Reverse osmosis, ultrafiltration among fastest growing membranes

Reverse osmosis, ultrafiltration, and nanofiltration membranes will exhibit

above average growth. Reverse osmosis is an increasingly popular option for users seeking extremely pure water, while ultrafiltration and nanofiltration offer a solution to users who require greater purity than that achieved with microfiltration but who do not need more expensive reverse osmosis membranes. While microfiltration membranes are the most mature product category and will show below average growth through 2019, they will remain the largest product category as they are generally the most affordable type of membrane and are often necessary in pretreatment applications to prevent the fouling of more selective membrane types.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Membrane Demand by Product

Demand for membranes in India is expected to grow at a faster rate than the fastest growth rate in the world over the forecast period. This is due to the overall manufacturing growth in India, particularly in sectors such as food and beverages, pharmaceuticals, and textiles. Investments in infrastructure, particularly in water supply, will be boosted since replacement systems will be driven by ongoing efforts to improve and extend the country's water and wastewater infrastructure, which is inefficient and incomplete. Many of these systems will involve the use of membranes since the country has insufficient fresh water resources and increasingly needs to tap into lower quality water supplies, including seawater, to accommodate the projected population growth and increasing industrialization. However, unlike many areas in which regulatory requirements are driving more widespread membrane use, India's drinking water quality standards are primarily voluntary. Further gains will also be restrained to a certain degree by difficulty in financing projects, meaning that many installations that are announced are not completed.

In 2014, microfiltration membranes accounted for the largest share of Indian membrane demand, with 41 percent of sales. However, reverse osmosis and ultrafiltration membranes -- which accounted for 11 and 23 percent of sales, respectively -- are forecast to achieve faster growth over the forecast period. This trend will largely be aided by the increased investment in desalination technology to treat very low-quality water, brackish water, or seawater for use in producing municipal water or in a variety of industrial applications.

Membrane-based desalination systems are the most widely used technology because of lower capital and energy costs compared to other technologies.

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SAMPLE
TEXT

TABLE VI-10

INDIA: MEMBRANE DEMAND BY PRODUCT
(million dollars)

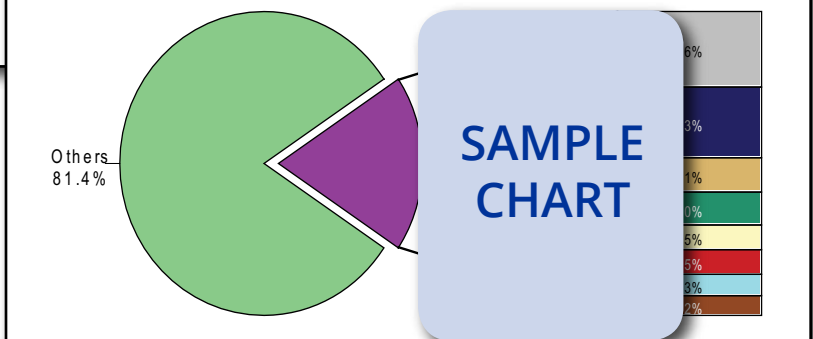
| Item | 2004 | 2009 | 2014 | 2019 | 2024 |
|---|------|------|------|------|------|
| Manufacturing Value Added (bil 2013\$) \$ membrane/000\$ MVA | | | | | |
| India Membrane Demand | | | | | |
| Microfiltration | | | | | |
| Reverse Osmosis | | | | | |
| Ultrafiltration | | | | | |
| Other Membranes | | | | | |
| % India | | | | | |
| Asia/Pacific Membrane Demand | | | | | |

Source: The Freedonia Group, Inc.

SAMPLE
TABLE

CHART VIII-1

WORLD MEMBRANE MARKET SHARE, 2014
(\$17.5 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE VI-11
INDIA: MEMBRANE DEMAND BY MARKET
 (million dollars)

| Item | 2004 | 2009 | 2014 | 2019 | 2024 |
|---|------|------|------|------|------|
| Water Use (bil cubic meters) \$ membrane/000 cubic m water use | | | | | |
| India Membrane Demand | | | | | |
| Water Treatment | | | | | |
| Wastewater Treatment | | | | | |
| Food & Beverage Processing | | | | | |
| Pharmaceutical & Medical | | | | | |
| Other Markets | | | | | |

Source: The Freedonia Group, Inc.

SAMPLE
TABLE

COMPANY PROFILES

Evoqua Water Technologies LLC
 181 Thorn Hill Road
 Warrendale, PA
 724-772-0044
<http://www.evco.com>

Annual Revenue: \$1.1 billion
 Employment: 1,000

Key Products: Reverse osmosis systems, ultrafiltration modules, and reverse osmosis systems for industrial desalination

Evoqua Water Technologies produces and provides water and wastewater treatment products, systems, and services used in industrial, municipal laboratory, commercial, and other markets. The Company was formed in January 2014, when private equity firm AEA Investors LP (New York, New York) acquired the Siemens Water Technologies LLC subsidiary of Siemens AG (Germany) for \$830 million.

The Company competes in the world membrane separation equipment industry via the manufacture of microfiltration, ultrafiltration, nanofiltration, and reverse osmosis (RO) systems and related products for such applications as corrosion and biofouling protection, drinking water treatment, groundwater remediation, wastewater treatment, and odor and vapor control.

Evoqua produces microfiltration membranes and systems under such brand names as MEMTEK, MEMPULSE, and XPRESS. For example, MEMTEK microfiltration systems employ proprietary crossflow tubular membranes made from KYNAR (Arkema SA -- France) polyvinylidene fluoride. These chemically inert membranes are capable of

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SAMPLE
PROFILE

STUDY COVERAGE

World Membrane Separation Technologies is a Freedonia study that presents historical demand data (2004, 2009, 2014) as well as forecasts (2019 and 2024) by product and market in 6 regions and 21 countries worldwide. The study also details market environment factors, examines the industry structure, evaluates company market share and profiles 41 global industry players.

Related Studies

World Consumer Water Treatment Systems

This study analyzes the world consumer water treatment system industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by type (point-of-entry, point-of-use), aftermarket component, technology (e.g., conventional filtration, membrane separation), world region, and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#3341.....November 2015.....\$6300

World Food Processing Machinery

Global demand for food processing machinery is projected to advance 7.6 percent annually to \$73 billion in 2019. Growth will be driven by industrializing nations, where strong consumer demand for processed foods is emerging. Beverage and chocolate/confectionery processing equipment will be the fastest growing types. This study analyzes the \$50.5 billion world food processing machinery industry, with forecasts for 2019 and 2024 by type for six world regions and 20 major countries. The study also evaluates company market share and profiles industry players.

#3275.....June 2015.....\$6300

Water Treatment Equipment

Demand for water treatment equipment in the US is expected to rise 5.3 percent annually to \$15.0 billion in 2019. Conventional filtration will remain the largest product segment, while disinfection equipment and membrane systems will be the fastest growing types. The municipal market will remain dominant while resource extraction leads gains. This study analyzes the \$11.6 billion US water treatment equipment industry, with forecasts for 2019 and 2024 by product, market, and application. The study also evaluates company market share and profiles industry players.

#3288.....May 2015.....\$5300

Membrane Separation Technologies

US membrane demand will rise 7.9 percent per year through 2018 to \$6.2 billion. Microfiltration will remain the largest category, while the second largest type, reverse osmosis membranes, will post faster gains. The municipal water treatment market will be driven by replacement demand and desalination plants. The drug/medical and chemical markets will grow the fastest. This study analyzes the \$4.2 billion US membrane industry, with forecasts for 2018 and 2023 by material, type and market. The study also evaluates company market share and profiles industry players.

#3219.....November 2014.....\$5300

World Filters

Global demand for filters is projected to increase a healthy 6.2 percent annually to \$80.0 billion in 2018. Most gains will come from large, developing industrial areas with nascent regulatory schemes, such as China and Indonesia. Manufacturing will be the fastest growing market, with rising production benefiting aftermarket filter demand. This study analyzes the \$59.1 billion world filter industry, with forecasts for 2018 and 2023 by product, market, world region, and for 22 countries. The study also evaluates company market shares and profiles industry players.

#3152.....July 2014.....\$6500

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

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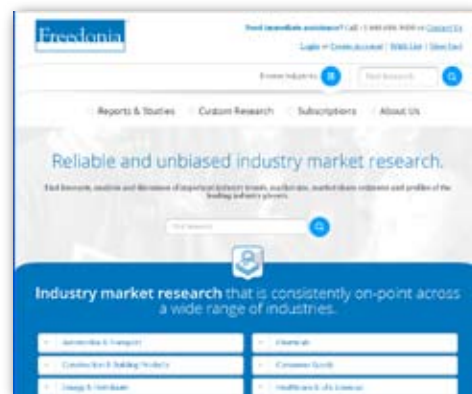
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