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World Membrane Separation Technologies

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

www.freedoniagroup.com

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Economic recovery from a global recession in 2009, coupled with rising environmental regulations and standards in many parts of the world with high population growth, will spur gains.

Global demand to jump over 9% yearly thru 2017

Global demand for membranes is projected to increase a healthy 9.2 percent yearly to $25.7 billion in 2017. Ongoing economic improvement in several key geographic markets through 2017 will boost gains as the global recession of 2009 and subsequent slow recovery restrained manufacturing activity and capital investments through 2012. Rising environmental standards and regulations in many parts of the world and high population growth, particularly in water-stressed areas, will further drive investment in membrane-based water and wastewater treatment systems.

The countries expected to see the fastest growth include the BRIC (Brazil, Russia, India, and China) countries and others with large, developing industrial bases and stressed local water resources. Combined, the US and China, the two largest national markets for membranes in 2012, are expected to account for 43 percent of all market growth between 2012 and 2017.

China to be fastest growing national market

By 2012, the Asia/Pacific region had surpassed North America to become the largest regional market, with 36 percent of global membrane sales. This region is led by the rapidly developing Chinese market, which represented 15 percent of global demand in 2012 and is projected to post the fastest growth rate through the forecast period. North America accounted for 27 percent of membrane sales worldwide in 2012. Demand growth in North America is expected to accelerate through 2017 from the more modest gains of the 2007-2012 period. Advances will be aided by the ongoing development of improved membranes to accommodate newer water quality regulations, the use of low-quality water in water-stressed regions, and rising interest in the more efficient use of water. In developing countries, gains will be based on the continued growth of water-intensive industries, and rising investment in modernizing water and waste infrastructure, particularly in areas that need to tap brackish or otherwise poor quality water resources.

Water treatment, drug & medical to be key markets

Treatment of seawater and brackish water sources is a key use for membranes in certain regions. For instance, much of the Middle East, North Africa, and the Caribbean have invested in membrane-based systems to ensure a sufficient supply of water for drinking, agriculture, and industry use. Historically, thermal distillation plants were more common, but even oil-rich nations are switching to more efficient reverse osmosis and other membrane-based desalination technologies.

Water treatment, the largest market for membranes, will also benefit from expansions or upgrades of water treatment infrastructures and a projected rebound in manufacturing activity in key geographic markets. However, the most rapid growth will emerge in the pharmaceutical and medical market, and other smaller markets such as chemical processing and environmental applications.

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Sample Text, Table & Chart

TABLE VI-10

INDIA: MEMBRANE DEMAND BY TYPE
(million dollars)

Item	2002	2007	2012	2017	2022
Manufacturing Value Added (bil 2011$)					
$ membrane/000$ MVA					
India Membrane Demand					
Microfiltration					
Reverse Osmosis					
Ultrafiltration					
Other					
% India					
Asia/Pacific Membrane Demand					

SAMPLE TABLE

ASIA/PACIFIC

India: Membrane Demand by Type

Demand ... expected to grow per year to $ ... rth fastest growth world over t ... overall manufact particularly ... sing industries suc beverages, p ... als, will propel ga erations in g ... red to the 2007-2 will also aide ... lacement sales will by the installation of a rising number of membrane-based s general terms, advances 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 the difficulty in financing projects, meaning that many installations that are announced are not completed.

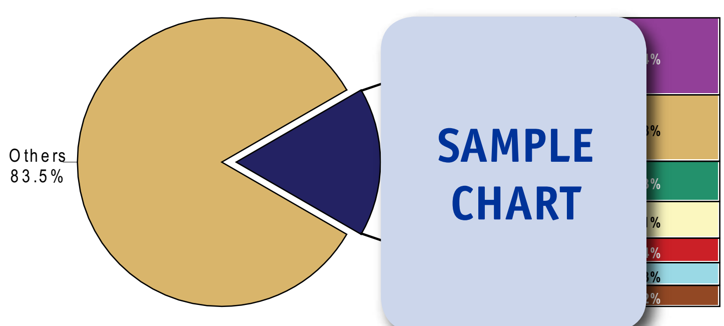
SAMPLE TEXT

In 2012, microfiltration membranes accounted for the largest share of Indian membrane demand, with 35 percent of sales. However, reverse osmosis and ultrafiltration membranes -- which accounted for 21 and 19 percent of sales, respectively -- are forecast to achieve faster growth over the forecast period. This trend will largely be aided by t investment in desalination technology to treat very low-qual brackish water, or seawater for use in producing municipal p or in a variety of industrial applications.

Membrane-based desalination systems are the most wid technology because of lower capital and energy costs compa

CHART VIII-1

WORLD MEMBRANE MARKET SHARE BY COMPANY
($16.5 billion, 2012)



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

Sample Profile, Table & Forecast

TABLE VI-11

INDIA: MEMBRANE DEMAND BY MARKET
(million dollars)

Item	2002	2007	2012	2017	2022
Water Use (bil cubic meters)					
$ membrane/000 cubic m water use					
India Membrane Demand					
Water Treatment					
Wastewater Treatment					
Food & Beverage Processing					
Pharmaceutical & Medical					
Other					

SAMPLE TABLE

COMPANY PROFILES

Vontron Technology Company Limited
Room 1108, T1, Xihuan Guangchang
No. 1 Xizhimenwai Street
Xicheng Distric
China
86-10-5830-18
http://www.vo

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

Vontron Technology specializes in the design, manufacture, and sale of reverse osmosis (RO) membranes sold under the VONTRON brand name for use in potable water, seawater desalination, sewage treatment, power generation, electronics, pharmaceutical, beverage, and other markets. The Company is privately held.

VONTRON RO membranes include general purpose, fouling resistant, seawater desalination, oxidation resistant, and residential types. For example, VONTRON general purpose RO membranes include the LP series. VONTRON LP membranes feature high permeated flow and enhanced desalination performance, among other benefits. These membranes are used in brackish water desalination processes, as well as the preparation of high purity water for the electronics and electrical power sectors. Other RO membranes in the VONTRON line include the ULP, XLP, SW, FR, and HOR series.

Vontron Technology manufactures RO membranes at facilities in Guiyang and Beijing, China. The Company also maintains sales and service centers in such major Chinese cities as Shanghai, Guangzhou,

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"Additionally, membrane demand will benefit from rising interest in water reuse to protect existing water supplies that are already stressed. For instance, one goal of the government's Jawaharlal Nehru National Urban Renewal Mission is to promote the recycling of at least 25 percent of water for use in applications such as construction, cooling towers, irrigation, and toilet flushing."
--Section VI, pg. 235

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Other Studies

World Consumer Water Treatment Systems

World demand for consumer water treatment systems will jump 12.4% annually, led by the BRIC (Brazil, Russia, India, China) and other countries with poor public treatment infrastructure. Gains will be driven by rising incomes and increasing awareness of water contamination. This study analyzes the $7.5 billion world consumer water treatment system industry, with forecasts for 2017 and 2022 by type, aftermarket component, technology, world region, and for 21 countries. The study also evaluates company market share and profiles industry participants.

#3110 ....January 2014 .... $6100

World Geosynthetics

Global demand for geosynthetics is expected to rise 8.9 percent per year to 5.2 billion square meters in 2017. Developing regions will be the fastest growing markets, with the Asia/Pacific region remaining the largest. Construction will be the largest and fastest growing application, especially in the key China and US markets. This study analyzes the 3.4 billion square meter world geosynthetics industry, with forecasts for 2017 and 2022 by product, market, world region, and for 19 countries. The study also evaluates company market share and profiles industry players.

#3108 ....December 2013 .... $6100

Water Treatment Equipment

Demand for water treatment equipment in the US is forecast to grow 5.9 percent per year to $13.0 billion in 2017. The resource extraction market will post the most rapid gains, followed by the recovering commercial and residential markets. Disinfection and membrane equipment will be the fastest growing product segments. This study analyzes the $9.8 billion US market for water treatment equipment, with forecasts for 2017 and 2022 by product, market, and application. The study also evaluates company market share and profiles industry players.

#3052 .... July 2013.................... $5100

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 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

About The Freedonia Group

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