

**New market report from the publishers
of *Global Water Intelligence***

Industrial Desalination and Water Reuse

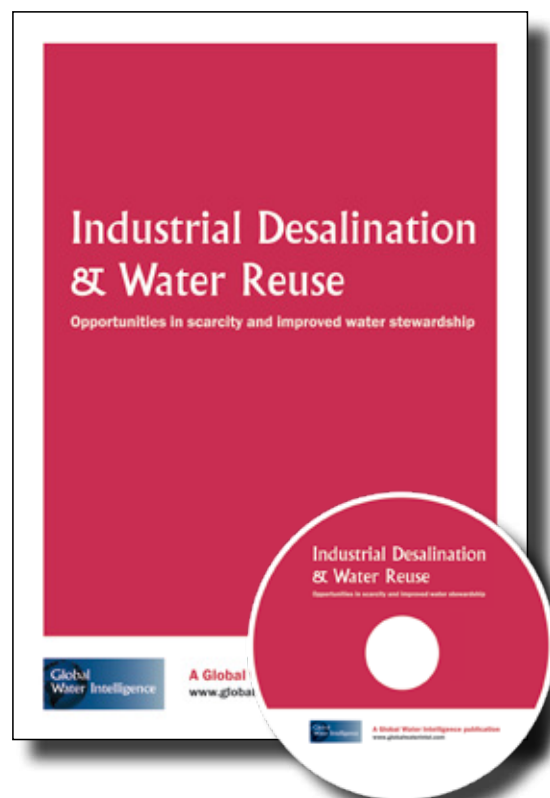
**Opportunities in scarcity and
improved water stewardship**

- **Global market forecast on CD-ROM:** volume and value data showing the size and expected growth rate of the industrial desalination and water reuse market
- **Profiles of the most water-intensive industry sectors and the issues that are driving market growth**
- **Showcase of the key technologies that will bring efficiency and value to industrial water processes**
- **Inventory of industrial seawater and high recovery wastewater desalination plants**

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WITH CD-ROM**

PUBLICATION: 30TH JUNE 2012



Industries covered:

Oil and gas

Petrochemicals

Power

Mining

Food and Beverage

Pharmaceuticals

Pulp & Paper

Microelectronics

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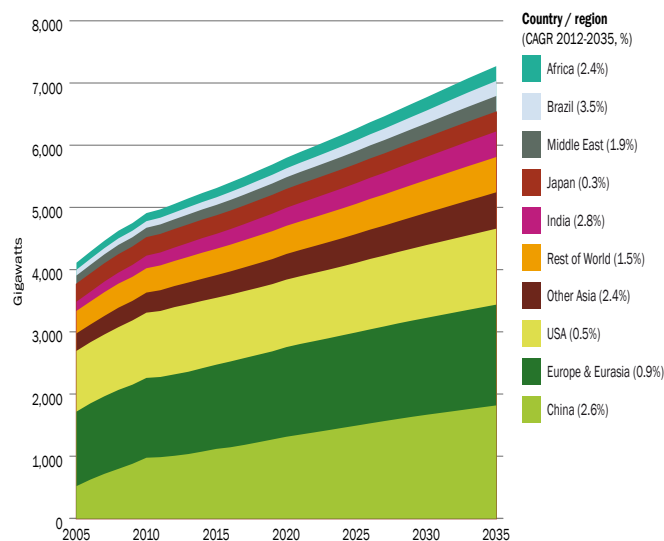
Industrial desalination and water reuse

Opportunities in scarcity and improved water stewardship

The focus of investment in desal and reuse is changing. The boom in municipal desalination and reuse which quadrupled the size of that market over the past decade has mostly played itself out. Now the smart money is on industrial water – the fastest growing sector of the water market today.

The growth in industrial desalination and water reuse over the coming years could match or surpass what we saw on the municipal side in the last decade.

World power generation capacity by country/region, 2005-2035



Source: EIA Annual Energy Outlook, 2011 (Reference case)

Water technology companies need to position themselves now to take advantage of this growth – or miss out. **Industrial Desalination and Water Reuse** is your key to this market. It pinpoints the technologies, industries, geographies and the markets which enjoy the greatest potential and gives you the information you need to act.

Contents

Industrial desalination and Water Reuse is divided into three sections, over 200 pages:

1. Overview of market drivers

This section looks at what's driving the market, and the geographies which are most under pressure to invest in water efficiency and improved wastewater treatment:

- Understanding industrial desalination and water reuse
- Global water risk and industrial water usage
- Water stewardship as a driver for investment
- Wastewater regulation
- Water as a driver of performance
- Procurement models
- The financial proposition
- Global market forecast: provides volume and value data showing the size and expected growth rate of the industrial desalination and water reuse market

2. Key Technologies Explained

- **Seawater desalination:** where and why are industrial water users turning to seawater desalination, and what are the trends in the membrane and thermal technologies they are using?
- **High purity process water:** value and technology trends in the ultra-pure water systems including reverse osmosis, ion exchange, and electrodeionisation
- **High recovery desalination:** why is demand for high recovery wastewater desalination systems growing so quickly, which industrial processes are driving demand, and how is technology shaping the market?
- **Low pressure membranes:** which industries are showing most interest in ultrafiltration and microfiltration as a solution to their process water and effluent treatment needs?
- **Other advanced wastewater treatment technologies:** how demand for improved water efficiency is driving technological development in biological treatment, physical/chemical separation and disinfection.

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CD Rom includes EXCEL spreadsheets for:

- Industrial desalination and water reuse market forecast
- Inventory of industrial seawater desalination plants
- Inventory of UF/MF installations with a capacity of more than 10,000m³/d
- Inventory of high recovery wastewater desalination plants

3. Market Sector Profiles

This section looks at the process water and discharge needs of the most water intensive business sectors and how they are investing in water technology to drive their performance.



Oil and gas: from the Canadian oil sands, to coal seam gas in Australia, and enhanced off-shore oil recovery, water treatment is emerging as a key driver of value across the energy sector. This section pinpoints the specific market niches which offer the richest opportunities for water technology companies.



Petrochemicals: the downstream petrochemical industry is moving more towards emerging economies like India and China as well as upstream producer economies in the Gulf and North Africa. Most new refining capacity is being built in water scarce areas, prompting a revolution in the way water is managed in this sector.



Power: electricity generation is the largest industrial water use. It's also responsible for some of the most challenging wastewaters. This, plus the growing power demands of emerging economies and the need to increase the efficiency of steam generation in mature economies, creates a recipe for solid market growth.



Mining: the process water needs of the mining industry are increasingly pressed up against social and environmental limits, forcing mining companies to make desalination and water reuse a central part of their strategy.



Food and Beverage: this is the largest industrial market for water technology by total expenditure. It is also the one which is most under pressure to improve its water stewardship.



Pharmaceuticals: global healthcare expenditure is expected to grow faster than the global economy as a whole for the foreseeable future. It also has some of the most complex water treatment needs seen anywhere in the industrial sector.



Pulp & Paper: a massive user of water, and potentially a significant source of pollution. Although the majority of plants are located in water rich regions, producers are being pushed towards reuse by tougher environmental regulation.



Microelectronics: the most significant and challenging market for high purity water. Process water requirements are continuing to become more exacting, while stewardship concerns are making companies rethink their approach to water efficiency and effluent treatment.

Who should read this report?

This report is essential reading for anyone involved in water technology with ambitions to succeed in some of the fastest growing and most lucrative niches of the global water market today.

Water and wastewater treatment systems suppliers: this is your guide to the most significant market opportunities available today

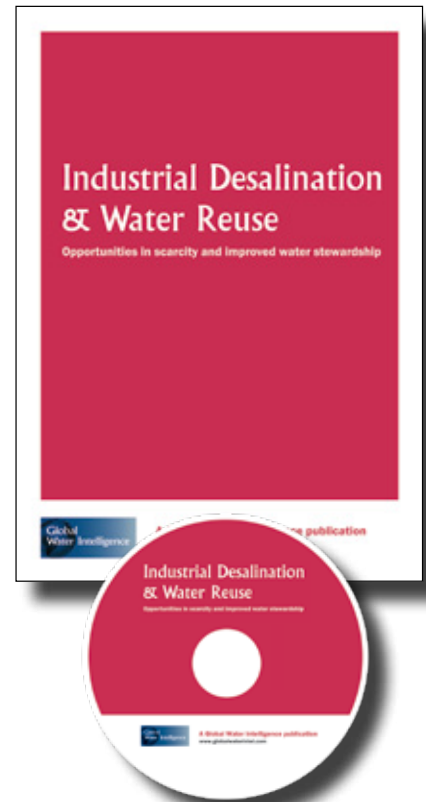
Desalination companies: with mounting competition and disappointing levels of growth in the municipal market, diversification in to industrial desalination is an essential strategy right now

Equipment suppliers: understand the changing needs of your customer base so your business plan stays relevant

Specialist water technology companies: discover the potential for niche applications of your technology

Investors: discover where the action is in today's water market, and who is best placed to capitalise on it

Operators: industrial outsourcing looks set to grow faster than municipal outsourcing over the next five years – find out how to take advantage of the opportunities



To see a table of contents and sample chapter, please visit www.desalination.com/industrialdesal

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