

Water Markets Worldwide 2004-2015 (updated in March 2005)

**With Focus on 57 Countries in Detail and Driving Technologies.
More Than 1300 Pages for the Total Study.**

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Water Technology Worldwide, Water and Waste Water, Drinking Water, Membrane Technology, Desalination/Drinking Water, Leading Companies, Automation, E-Technique and Services, Water Treatment, Disinfection, Water Energy Convergence and Hydrogen, Multi-Utility Markets and Companies, Information(IT) in Water Market, Water in Life Science, Countries and Regions.

I. Initial Position

The world market for water and waste water amounts to 287.0 Bn. US\$ in 2004. The markets are expected to expand further with high growth rates to 303.1 Bn. US\$ by 2005 and 412.4 Bn. US\$ by 2010. The regions, technology and consumer segments differ, as well as profit potentials for single markets and companies.

The Helmut Kaiser Consultancy has completed a study, that researches and values the development of the world markets, single consumer sectors and technology segments. The highest growth rates (14% in 2003) are in sectors mineral and bottled water, this markets are expected to double from 2003 to 2008. In this sector 5 companies are dominating worldwide with a market share of 20%. The global market for table water will show a stable high growth rate, because for the public drinking water there are problems like low quality and in some regions even serious supply shortage. The sales potential for local producers of table water presents more than 12% growth rate in best practice- in comparison.

The public drinking water supply has grown with an average annual rate of 9% and high investment in this field is expected. The world bank has granted an investment of over 450 Bn US\$ for the next 10 years. For over one third of the world population in many regions, especially Africa, South America and part of Asia, the drinking water is a quality problem and supply shortage too. There are also such problems even in industrial countries.

The water treatment is a segment with an especially high growth rate. The drinking water market worldwide is dominated by communal companies, which belong fully or partially to the states, as well as by big multinational corporations. The sector of supply is dominated by about 20,000 companies worldwide. A further concentration into big corporations is expected also in the process of privatisation due to high investments and operating costs. The drinking water market provides very limited profit potentials (less than 12%), on the other hand it is a long-lasting market with small year fluctuations. Companies and public institutions, that combine drinking water with other utilities like waste water and energy, are fully capable to gain a higher return of more than 15%. The highest growth rates are expected in Asia, especially in China because the state has launched public programs to improve the drinking water situation in the next 5 years.

In the field of waste water, i.e. clarification of waste water, the situation has improved slightly. Worldwide, 14% of all waste water in the year 2004 was purified. Bottom of this development are South America and Africa with less than 2% waste water purification. The most important influential factors are population development, increasing demand for foodstuff and thus demand for water, urbanization, germination, pesticides, nitrates and above all resistance to antibiotics in surface water in the industrialized countries.

II. Goals of the Study

The study provides a foundation to gain information about trends, opportunities and risks and to evaluate initial situation and further development as well, identifies and evaluates the growth and profit opportunities within the segments of technologies/markets and value chain. It deals with the following technology sectors:

- Drinking water, water desalination
- Water treatment/water purification
- Treatment of waste water in industry and municipality
- Energy in the water industry
- Automation, E-Technique and Services in Water Market
- Emerging membrane technology
- Emerging desalination

The study is arranged by sectors and can be obtained either completely, or each sector separately. The markets are presented by countries and regions, as well as by market segments.

The study provides an analysis and profiles, as well as presentation of the leading water companies (more than 1500) that are quoted on the stock exchange and their factors of success and technology portfolio. This part of the study can be obtained extra (see reply form).

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IV. Countries

57 countries, grouped by regions, each 20 pages, plus regions summaries and world summary.
Presented in groups without page numbers, totally 1160 pages.

Market volumes and developments are presented for the following markets, segments and countries up to year 2010:

- Plant Investment Total
- Plant Investment New Construction
- Plant Investment Modernization
- Plant Operation
- New Services and Technologies

Countries and Regions:

(20 pages per country / region summary / worldwide summary)

Western Europe

Germany
France
Italy
Great Britain
Ireland
Spain
Portugal
Netherlands
Norway
Sweden
Finland
Denmark
Austria
Switzerland
Turkey
Rest WE
Rest N/E Asia

Eastern Europe / CIS

Czech Republic
Poland
Hungary
Rest OEU / MEU
Russia
Turk-Countries
Rest CIS

NAFTA

USA
Canada
Mexico

South and Middle America

Venezuela
Argentina
Brazil
Columbia
Chile
Rest S/M America

Asia / Australia

Japan
China
Korea
Worldwide Summary
India
Pakistan
Singapore
Vietnam
Thailand
Rest South Asia
Australia
New Zealand

Middle East

Israel
UAE
Saudi Arabia
Iran
Iraq
Egypt
Rest Middle East

Africa

South Africa
Morocco
Algeria
Tunisia
Libya
Rest Africa

V. Time Schedule

The study is completed and can be delivered immediately.

VI. Methods of Investigation

The study is based on the following methods: Desk and Field Research. Market potentials and prospects are gathered by the Delphi-Method. Here specialists in the market are questioned about their future expectations which are then narrowed through repeated coordination with the specialists.

VII. Qualification

Our company has been active in the field of water industry, environmental and energy technology for over than 20 years. We prepare exclusive international strategies, concepts and special studies for company groups, small and midsize businesses and Western European government agencies. Until today we have prepared more than 700 studies

VIII Reply Form

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Study: Water Markets Worldwide 2004-2015

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