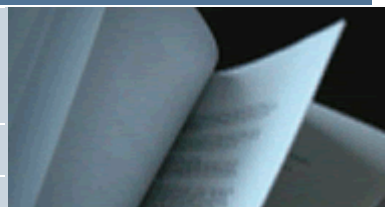


European Sludge Treatment Equipment Markets

Price: USD 7,000



- | | | |
|--|--|-------------------------------------|
| → REPORT OVERVIEW | → BENEFITS OF THIS SERVICE | → MARKET SECTORS |
| → TECHNOLOGIES | → LIST OF FIGURES | → TABLE OF CONTENTS |
| → ORDERING INFORMATION | → FURTHER INFORMATION | |

Research Overview

Effective Legislation Propels Growth in the European Sludge Treatment Equipment Market

Demand for sludge treatment equipment in Europe is on the rise following stringent European Union and national legislation governing the quality and disposal of final sewage sludge. Governments have placed mandates responding to strong public opinion and the pressures from varied consumer groups. Future opportunities depend on the implementation of many existing policies as well as on the impending regulatory decisions. The Urban Wastewater Treatment Directive with its next deadlines due to be put in practice by 2005 in particular drives the market to meet legislative requirements thus boosting the demand for treatment equipment. The increasing generation of sludge is further driving this industry as the establishment of new wastewater treatment plants adds to the escalating sludge production.

This Frost & Sullivan research studies the potential for treatment technologies in the European sludge treatment equipment market. It explores the continued momentum behind the sludge treatment technologies that have been subdivided into five principal treatment processes (sludge thickening, digestion, dewatering, drying and novel solutions including pasteurisation, ultrasonic and thermal processes) with a specific view on future transformations and the strategic implications. Related sludge disposal trends and their influences have also been addressed. The purpose of this study is to support decision making in an increasingly volatile yet persistently flourishing market.

Regional Disparities in Europe Generate Different Opportunities

Market prospects, though promising, are increasingly challenging and are creating a need for inventive and innovative strategies. "There exists considerable regional variation with respect to the level of market development – both technological as well as in the level of treatment capacity and associated demand for treatment equipment," notes the analyst of this research. Opportunities in mature markets such as Germany and Scandinavia exist largely for refurbishment and upgrades. Growing markets in southern Europe, and to some degree in France and the United Kingdom, present opportunities for treatment equipment and the establishment of new plants.

In terms of treatment methods, up-stream technologies such as dewatering and thickening are expected to constitute the bulk of revenues but they are likely to be increasingly pursued by the advancing drying technologies. The underlying challenge in the market lies in improving facilities to treat secondary sludge more effectively and efficiently in order to reduce disposal problems.

Novel Technologies to Boost Mature Market Regions

"Since some of the principal markets such as Germany, Scandinavia and the United Kingdom are showing increasing signs of maturity, treatment equipment manufacturers are actively considering novel treatment solutions and processes – in particular to enhance dewatering and digestion," states the analyst.

To improve revenue prospects in these regions, the market began to test enhanced performance techniques such as pasteurisation, ultrasonic and thermal processes (the latter including thermal oxidation, wet air oxidation and thermal hydrolysis), which are particularly aimed at secondary treatment of sludge. These techniques essentially augment the productivity and performance of traditional technologies and have experienced emerging though yet indefinite success in the European market.

Frost & Sullivan Growth Partnership Service

Based on extensive and in-depth research, real-world consulting work, and new theories tested in hundreds of companies across many industries, Frost & Sullivan has evolved its Growth Partnership Services (GPS) program that provides established and emerging firms with powerful growth visions. Moving beyond token mission statements, GPS provides an actionable vision to growth consulting partners by illustrating how key intelligence and strategic research based on defined goals can guide day-to-day behavior and overall company direction. The foundation of Frost & Sullivan's GPS includes:

- Assisting companies to reach their full potential in the core business
- Providing growth strategies to help companies expand into related businesses

- Preemptively redefining the core business during market turbulence
- Applying the Frost & Sullivan framework to identify and address common mistakes resulting from misaligned corporate strategies
- Recommending growth management strategies through continuous partnership

To maximize the potential for growth within a firm's internal and external environment, Frost & Sullivan consultants can facilitate the creation of strategic programs that deliver improved market success. Frost & Sullivan's strengths lie in combining strategic understanding with market expertise and applying these with absolute commitment to its clients' growth.

Table Of Contents

1. Executive Summary

1. Introduction to the European Sludge Treatment Equipment Market

1. Abstract
2. Market Definitions and Segmentation

2. Summary of Major Findings

1. Market Growth Opportunities
2. Technology Trends
3. Regional Trends
4. End-user Trends
5. Competitive Analysis
6. Strategic Conclusions

2. Industry Challenges and Market Forces

1. Challenges Facing the Market

1. Top Challenges
 - a. Sludge Disposal Trends Dictate Treatment Requirements and Methods
 - b. Rising Regulations and Public Concerns Drive Environmentally Sound Treatment Processes
 - c. Legislative and Regulatory Uncertainty Exacerbate Business Apathy
 - d. Compliance with UWWT Directive
 - e. Maturing Market with Slow Down in Large Scale Investments and Increasing Consolidation
 - f. Immense Regional Variations with Regard to Level of Technological Advancement and Treatment Capacity
 - g. Emerging Price Competition Squeeze Profit Margins
 - h. Increasing Market for Refurbishment and Upgrades
 - i. Increase in Disposal Costs
 - j. Conservative Utilities Limiting Expansion into New Business

2. Market Forces

1. Force Field Analysis
2. Legislative Influences
3. Market Drivers
 - a. EU Legislation and Financial Support
 - b. Increasing Amount of Sludge Production
 - c. Continuous Refurbishment and Upgrading of Old Treatment Plants
 - d. Need to Improve Treatment Capacity
 - e. Consumer Pressure and Public Concern Over Sludge Disposal
 - f. Demands to Pre-empt Regulatory Developments for Safer Sludge Disposal
 - g. Government Incentives and Promotion of Energy Recovery and Demands for Material Recovery (e.g.

Phosphate)

- h. Safety Regulations Pushing Advanced Dust-free Solutions (ATEX Regulation)
 - i. Incineration Technology Drives the Dewatering and Drying Technologies
 - j. Anticipated Growth in Industrial Treatment
4. Market Restraints
 - a. Fierce Competition and Maturing Market
 - b. Regulatory Uncertainty Over Sludge to Land Disposal
 - c. Traditionally Conservative Market
 - d. Decline in Sludge Volumes in Some European Countries
 - e. Municipal Budgetary Constraints
 - f. Governmental Inefficiencies in Southern Europe
 - g. Immense Regional Variations
 - h. Price Pressures Dictate Market Trends
 - i. Growing Market for Incineration
 - j. Introduction of Green/Natural Technologies
 5. Influential of Disposal Trends

3. Total Sludge Treatment Equipment Market Analysis

1. Market Overview and Scope

1. Introduction
2. Market Engineering Measurements
3. Market Definitions and Segmentation

2. Total Market Evaluation and Forecasts (2000-2010)

1. Total Forecasts
2. Comparative Technology Trends
3. Trends by Geographic Region
4. Trends by End-users
5. Pricing Strategy and Trend Analysis

3. Forecasts by Technology
 1. Sludge Thickening Market Forecasts
 2. Sludge Digestion/Stabilisation Market Forecasts
 3. Sludge Dewatering Market Forecasts
 4. Sludge Drying Market Forecasts
 5. Sludge Novel Technology Market Forecasts
4. Competitive Analysis
 1. Competitive Structure
 2. Database of Key Industry Participants
 3. Total Market Share Analysis
 4. Competitive Analysis by Technologies
 5. Competitive Analysis by Regions
4. Forecasts of the German Sludge Treatment Equipment Market
 1. Market Overview and Scope
 1. Introduction
 2. Market Engineering Measurements
 3. Market Forces
 2. Total Market Evaluation and Forecasts
 1. Total Forecasts
 2. Comparative Technology Trends
 3. Trends by End-users
 3. Forecasts by Technology
 1. Sludge Thickening Market Forecasts
 2. Sludge Digestion/Stabilisation Market Forecasts
 3. Sludge Dewatering Market Forecasts
 4. Sludge Drying Market Forecasts
 5. Novel Technology Market Forecasts
 4. Competitive Analysis
 1. Competitive Structure
 2. Market Share
5. Forecasts of the U.K. Sludge Treatment Equipment Market
 1. Market Overview and Scope
 1. Introduction
 2. Market Engineering Measurements
 3. Market Forces
 2. Total Market Evaluation and Forecasts
 1. Total Forecasts
 2. Comparative Technology Trends
 3. Trends by End-users
 3. Forecasts by Technology
 1. Sludge Thickening Market Forecasts
 2. Sludge Digestion/Stabilisation Market Forecasts
 3. Sludge Dewatering Market Forecasts
 4. Sludge Drying Market Forecasts
 5. Novel Technology Market Forecasts
 4. Competitive Analysis
 1. Competitive Structure
 2. Market Shares
6. Forecasts of the French Sludge Treatment Equipment Market
 1. Market Overview and Scope
 1. Introduction
 2. Market Engineering Measurements
 3. Market Forces
 2. Total Market Evaluation and Forecasts
 1. Total Forecasts
 2. Comparative Technology Trends
 3. Trends by End-users
 3. Forecasts by Technology
 1. Sludge Thickening Market Forecasts
 2. Sludge Digestion/Stabilisation Market Forecasts
 3. Sludge Dewatering Market Forecasts
 4. Sludge Drying Market Forecasts
 5. Novel Technology Market Forecasts
 4. Competitive Analysis
 1. Competitive Structure
 2. Market Share
7. Forecasts of the Italian Sludge Treatment Equipment Market
 1. Market Overview and Scope
 1. Introduction
 2. Market Engineering Measurements
 3. Market Forces
 2. Total Market Evaluation and Forecasts
 1. Total Forecasts
 2. Comparative Technology Trends

3. Trends by End-users
 3. Forecasts by Technology
 1. Sludge Thickening Market Forecasts
 2. Sludge Digestion/Stabilisation Market Forecasts
 3. Sludge Dewatering Market Forecasts
 4. Sludge Drying Market Forecasts
 5. Novel Technology Market Forecasts
 4. Competitive Analysis
 1. Competitive Structure
 2. Market Share
8. Forecasts of the Iberian (Spain and Portugal) Sludge Treatment Equipment Market
1. Market Overview and Scope
 1. Introduction
 2. Market Engineering Measurements
 3. Market Forces
 2. Total Market Evaluation and Forecasts
 1. Total Forecasts
 2. Comparative Technology Trends
 3. Trends by End-users
 3. Forecasts by Technology
 1. Sludge Thickening Market Forecasts
 2. Sludge Digestion/Stabilisation Market Forecasts
 3. Sludge Dewatering Market Forecasts
 4. Sludge Drying Market Forecasts
 5. Novel Technology Market Forecasts
 4. Competitive Analysis
 1. Competitive Structure
 2. Market Share
9. Forecasts of the Scandinavian Sludge Treatment Equipment Market
1. Market Overview and Scope
 1. Introduction
 2. Market Engineering Measurements
 3. Market Forces
 2. Total Market Evaluation and Forecasts
 1. Total Forecasts
 2. Comparative Technology Trends
 3. Trends by End-users
 3. Forecasts by Technology
 1. Sludge Thickening Market Forecasts
 2. Sludge Digestion/Stabilisation Market Forecasts
 3. Sludge Dewatering Market Forecasts
 4. Sludge Drying Market Forecasts
 5. Novel Technology Market Forecasts
 4. Competitive Analysis
 1. Competitive Structure
 2. Market Share
10. Forecasts of the Benelux Sludge Treatment Equipment Market
1. Market Overview and Scope
 1. Introduction
 2. Market Engineering Measurements
 3. Market Forces
 2. Total Market Evaluation and Forecasts
 1. Total Forecasts
 2. Comparative Technology Trends
 3. Trends by End-users
 3. Forecasts by Technology
 1. Sludge Thickening Market Forecasts
 2. Sludge Digestion/Stabilisation Market Forecasts
 3. Sludge Dewatering Market Forecasts
 5. Sludge Drying Market Forecasts
 6. Novel Technology Market Forecasts
 4. Competitive Analysis
 1. Competitive Structure
 2. Market Share
11. Forecasts of Rest-of-Europe Sludge Treatment Equipment Market
1. Market Overview and Scope
 1. Introduction
 2. Market Engineering Measurements
 3. Market Forces
 2. Total Market Evaluation and Forecasts
 1. Total Forecasts
 2. Comparative Technology Trends
 3. Competitive Analysis
 1. Competitive Structure and Leading Players

12. Frost & Sullivan Awards

1. Award category: Market Leadership
 1. Award Definition
 2. Award Recipient: Andritz
2. Award category: Product Innovation
 1. Award Definition
 2. Award Recipient: IWE.tech
3. Award Category: Growth Strategy Leadership
 1. Award Definition
 2. Award Recipient: Purac

List Of Figures

Chapter 1

- Sludge Treatment Equipment Market: Market Drivers and Restraints Ranked in Order of Impact (Europe), 2004-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by Product Segment (Europe), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by Geographic Region (Europe), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by Municipal End-user Segments (Europe), 2000-2010
- Sludge Treatment Equipment Market: Competitive Structure (Europe), 2003

Chapter 2

- Sludge Treatment Equipment Market: Impact of Top Ten Industry Challenges (Europe), 2004-2010
- Sludge Treatment Equipment Market: Relevant Legislation and Policy (Europe), 2003
- Sludge Treatment Equipment Market: Market Drivers Ranked in Order of Impact (Europe), 2004-2010
- Sludge Treatment Equipment Market: Market Restraints Ranked in Order of Impact (Europe), 2004-2010
- Sludge Treatment Equipment Market: Percent of Sludge Volumes by Disposal Channel (Europe), 2003-2010
- Sludge Treatment Equipment Market: Three Regional Disposal Clusters (Europe), 2003

Chapter 3

- Total Sludge Treatment Equipment Market: Market Forecast (Europe), 2000-2010
- Total Sludge Treatment Equipment Market: The Life Cycle Model—Development Stage by Products (Europe), 2003
- Total Sludge Treatment Equipment Market: Product Segment Characteristics (Europe), 2003
- Total Sludge Treatment Equipment Market: Percentage of Revenues by Product Segment (Europe), 2000-2010
- Total Sludge Treatment Equipment Market: The Life Cycle Model—Development Stage by Regions (Europe), 2003
- Total Sludge Treatment Equipment Market: Regional Market Characteristics (Europe), 2003
- Total Sludge Treatment Equipment Market: Percentage of Revenues by Geographic Region (Europe), 2000-2010
- Total Sludge Treatment Equipment Market: The Life Cycle Model—Development Stage by End-users (Europe), 2003
- Total Sludge Treatment Equipment Market: End-user Characteristics (Europe), 2003
- Total Sludge Treatment Equipment Market: Percentage of Revenues by End-user Segments (Europe), 2000-2010
- Total Sludge Treatment Equipment Market: Percentage of Revenues by Industrial End-user Segments (Europe), 2000-2010
- Total Sludge Treatment Equipment Market: Percentage of Revenues by Municipal End-user Segments (Europe), 2000-2010
- Total Sludge Treatment Equipment Market: Pricing Trend Analysis by Technology (Europe), 2003
- Sludge Thickening Equipment Market: Market Forecast (Europe), 2000-2010
- Sludge Thickening Equipment Market: Percent of Revenues by Technologies with Growth

Prospect (Europe), 2003

- Sludge Thickening Equipment Market: Percentage Shares of Regional Market Revenues (Europe), 2000-2010
- Sludge Digestion Equipment Market: Market Forecast (Europe), 2000-2010
- Sludge Digestion Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Europe), 2003
- Sludge Digestion Equipment Market: Shares of Regional Market Revenues (Europe), 2000-2010
- Sludge Dewatering Equipment Market: Market Forecast (Europe), 2000-2010
- Sludge Treatment Dewatering Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Europe), 2003
- Sludge Dewatering Equipment Market: Shares of Regional Market Revenues (Europe), 2000-2010
- Sludge Drying Equipment Market: Market Forecast (Europe), 2000-2010
- Sludge Drying Equipment Market: Shares of Regional Market Revenues (Europe), 2000-2010
- Sludge Novel Solutions Equipment Market: Market Forecast (Europe), 2000-2010
- Sludge Novel Solutions Equipment Market: Percentage of Revenues by Technologies with Growth Prospects (Europe), 2003
- Sludge Novel Solutions Equipment Market: Market Forecasts (Europe), 2003-2010
- Sludge Novel Solutions Equipment Market: Shares of Regional Market (Europe), 2000-2010
- Sludge Treatment Equipment Market: Competitive Structure (Europe), 2003
- Sludge Treatment Equipment Market: Database of Key Industry Participants (Europe), 2003
- Sludge Treatment Equipment Market: Market Share and Trend Analysis (Europe), 2003
- Sludge Treatment Equipment Market: Competitive Forces by Product Segments (Europe), 2003
- Sludge Treatment Equipment Market: Competitive Profile by Product Segments (Europe), 2003
- Sludge Treatment Equipment Market: Market Leaders by Product Segments (Europe), 2003
- Sludge Treatment Equipment Market: Competitive Forces by Region (Europe), 2003
- Sludge Treatment Equipment Market: Competitive Profile by Regions (Europe), 2003
- Sludge Treatment Equipment Market: Market Leaders by Regions (Europe), 2003

Chapter 4

- Sludge Treatment Equipment Market: Percent of Sludge Volumes by Disposal Channel (Germany), 2003-2010
- Sludge Treatment Equipment Market: Market Drivers Ranked in Order of Impact (Germany), 2004-2010
- Sludge Treatment Equipment Market: Market Restraints Ranked in Order of Impact (Germany), 2004-2010
- Sludge Treatment Equipment Market: Market Forecast (Germany), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by Technologies (Germany), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by End-users (Germany), 2003
- Sludge Thickening Equipment Market: Market Forecast (Germany), 2000-2010
- Sludge Thickening Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Germany), 2003
- Sludge Digestion Equipment Market: Market Forecast (Germany), 2000-2010
- Sludge Digestion Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Germany), 2003
- Sludge Dewatering Equipment Market: Market Forecast (Germany), 2000-2010
- Sludge Dewatering Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Germany), 2003
- Sludge Drying Equipment Market: Market Forecast (Germany), 2000-2010
- Sludge Novel Solutions Equipment Market: Market Forecast (Germany), 2000-2010
- Sludge Novel Solutions Equipment Market: Percentage of Revenues by Technology with

Growth Prospect (Germany), 2003

- Sludge Novel Solutions Equipment Market: Market Revenue Forecasts (Germany), 2003
- Sludge Treatment Equipment Market: Competitive Structure (Germany), 2003
- Sludge Treatment Equipment Market: Market Share Analysis and Trend (Germany), 2003

Chapter 5

- Sludge Treatment Equipment Market: Relevant Country Specific Regulations and Legislation (United Kingdom), 2003
- Sludge Treatment Equipment Market: Percent of Sludge Volumes by Disposal Channel (United Kingdom), 2003-2010
- Sludge Treatment Equipment Market: Market Drivers Ranked in Order of Impact (United Kingdom), 2003-2010
- Sludge Treatment Equipment Market: Market Restraints Ranked in Order of Impact (United Kingdom), 2004-2010
- Sludge Treatment Equipment Market: Market Forecast (United Kingdom), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by Technologies (United Kingdom), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by End-users (United Kingdom), 2003
- Sludge Thickening Equipment Market: Market Forecast (United Kingdom), 2000-2010
- Sludge Thickening Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (United Kingdom), 2003
- Sludge Digestion Equipment Market: Market Forecast (United Kingdom), 2000-2010
- Sludge Digestion Equipment Market: Percentage of Revenues by Technologies with Growth Prospects (United Kingdom), 2003
- Sludge Dewatering Equipment Market: Market Forecast (United Kingdom), 2000-2010
- Sludge Dewatering Equipment Market: Percentage of Revenues by Technologies (United Kingdom), 2003
- Sludge Drying Equipment Market: Market Forecast (United Kingdom), 2000-2010
- Sludge Novel Solutions Equipment Market: Market Forecast (United Kingdom), 2000-2010
- Sludge Novel Solutions Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (United Kingdom), 2003
- Sludge Novel Solutions Equipment Market: Market Revenue Forecasts (United Kingdom), 2003
- Sludge Treatment Equipment Market: Competitive Structure (United Kingdom), 2003
- Sludge Treatment Equipment Market: Market Share Analysis and Trend (United Kingdom), 2003
- Sludge Treatment Equipment Market: Leading Players by Product Segments (United Kingdom), Sludge Treatment Equipment Market: Leading Players by Product Segment (United Kingdom), 2003

Chapter 6

- Sludge Treatment Equipment Market: Percent of Sludge Volumes by Disposal Channel (France), 2003-2010
- Sludge Treatment Equipment Market: Market Drivers Ranked in Order of Impact (France), 2004-2010
- Sludge Treatment Equipment Market: Market Restraints Ranked in Order of Impact (France), 2004-2010
- Sludge Treatment Equipment Market: Market Forecast (France), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by Technologies (France), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by End-users (France), 2003
- Sludge Thickening Equipment Market: Market Forecast (France), 2000-2010
- Sludge Thickening Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (France), 2003
- Sludge Digestion Equipment Market: Market Forecast (France), 2000-2010
- Sludge Digestion Equipment Market: Percentage of Revenues by Technologies with Growth Prospects (France), 2003

- Sludge Dewatering Equipment Market: Market Forecast (France), 2000-2010
- Sludge Dewatering Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (France), 2003
- Sludge Drying Equipment Market: Market Forecast (France), 2000-2010
- Sludge Novel Solutions Equipment Market: Market Forecast (France), 2000-2010
- Sludge Novel Solutions Equipment Market: Percentage of Revenues (France), 2003
- Sludge Novel Solutions Equipment Market: Market Revenue Forecasts (France), 2003
- Sludge Treatment Equipment Market: Competitive Structure (France), 2003
- Sludge Treatment Equipment Market: Market Share Analysis and Trend (France), 2003
- Sludge Treatment Equipment Market: Market Leaders by Technology Segment (France), 2003
- Sludge Treatment Equipment Market: Market Leaders by Technology Segment (France), 2003

Chapter 7

- Sludge Treatment Equipment Market: Percent of Sludge Volumes by Disposal Channel (Italy), 2003-2010
- Sludge Treatment Equipment Market: Market Drivers Ranked in Order of Impact (Italy), 2004-2010
- Sludge Treatment Equipment Market: Market Restraints Ranked in Order of Impact (Italy), 2004-2010
- Sludge Treatment Equipment Market: Market Forecast (Italy), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by Technologies (Italy), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by End-users (Italy), 2000-2010
- Sludge Thickening Equipment Market: Market Forecast (Italy), 2000-2010
- Sludge Thickening Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Italy), 2003
- Sludge Digestion Equipment Market: Market Forecast (Italy), 2000-2010
- Sludge Digestion Equipment Market: Percentage of Revenues by Technologies with Growth Prospects (Italy), 2003
- Sludge Dewatering Equipment Market: Market Forecast (Italy), 2000-2010
- Sludge Dewatering Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Italy), 2003
- Sludge Drying Equipment Market: Market Forecast (Italy), 2000-2010
- Sludge Novel Solutions Equipment Market: Market Forecast (Italy), 2000-2010
- Sludge Novel Solutions Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Italy), 2003
- Sludge Novel Solutions Equipment Market: Market Revenue Forecasts (Italy), 2003
- Sludge Treatment Equipment Market: Competitive Structure (Italy), 2003
- Sludge Treatment Equipment Market: Market Share Analysis and Trend (Italy), 2003
- Sludge Treatment Equipment Market: Market Leaders by Technology Segments (Italy), 2003
- Sludge Treatment Equipment Market: Market Leaders by Technology Segments (Italy), 2003

Chapter 8

- Sludge Treatment Equipment Market: Percent of Sludge Volumes by Disposal Channel (Iberia), 2003-2010
- Sludge Treatment Equipment Market: Market Drivers Ranked in Order of Impact (Iberia), 2004-2010
- Sludge Treatment Equipment Market: Market Restraints Ranked in Order of Impact (Iberia), 2004-2010
- Sludge Treatment Equipment Market: Market Forecast (Iberia), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by Technologies (Iberia), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by End-users (Iberia), 2003

- Sludge Thickening Equipment Market: Market Forecast (Iberia), 2000-2010
- Sludge Thickening Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Iberia), 2003
- Sludge Digestion Equipment Market: Market Forecast (Iberia), 2000-2010
- Sludge Digestion Equipment Market: Percentage of Revenues by Technologies with Growth Prospects (Iberia), 2003
- Sludge Dewatering Equipment Market: Market Forecast (Iberia), 2000-2010
- Sludge Dewatering Equipment Market: Percentage of Revenues by Technologies (Iberia), 2003
- Sludge Drying Equipment Market: Market Forecast (Iberia), 2000-2010
- Sludge Treatment Equipment Market: Competitive Structure (Iberia), 2003
- Sludge Treatment Equipment Market: Market Share Analysis and Trend (Iberia), 2003
- Sludge Treatment Equipment Market: Market Leaders by Technology Segments (Iberia), 2003

Chapter 9

- Sludge Treatment Equipment Market: Percent of Sludge Volumes by Disposal Channel (Scandinavia), 2003-2010
- Sludge Treatment Equipment Market: Market Drivers Ranked in Order of Impact (Scandinavia), 2004-2010
- Sludge Treatment Equipment Market: Market Restraints Ranked in Order of Impact (Scandinavia), 2004-2010
- Sludge Treatment Equipment Market: Market Forecast (Scandinavia), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by Technologies (Scandinavia), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by End-users (Scandinavia), 2003
- Sludge Thickening Equipment Market: Market Forecast (Scandinavia), 2000-2010
- Sludge Thickening Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Scandinavia), 2003
- Sludge Digestion Equipment Market: Market Forecast (Scandinavia), 2000-2010
- Sludge Digestion Equipment Market: Percentage of Revenues by Technologies with Growth Prospects (Scandinavia), 2003
- Sludge Dewatering Equipment Market: Market Forecast (Scandinavia), 2000-2010
- Sludge Dewatering Equipment Market: Percentage of Revenues by Technologies (Scandinavia), 2003
- Sludge Drying Equipment Market: Market Forecast (Scandinavia), 2000-2010
- Sludge Novel Solutions Equipment Market: Market Forecast (Scandinavia), 2000-2010
- Sludge Novel Solutions Equipment Market: Percentage of Revenues (Scandinavia), 2003
- Sludge Novel Solutions Equipment Market: Market Revenue Forecasts (Scandinavia), 2003
- Sludge Treatment Equipment Market: Competitive Structure (Scandinavia), 2003
- Sludge Treatment Equipment Market: Market Share Analysis and Trend (Scandinavia), 2003
- Sludge Treatment Equipment Market: Market Leaders by Technology Segments (Scandinavia), 2003
- Sludge Treatment Equipment Market: Market Leaders by Technology Segments (Scandinavia), 2003

Chapter 10

- Sludge Treatment Equipment Market: Percent of Sludge Volumes by Disposal Channel (Benelux), 2003-2010
- Sludge Treatment Equipment Market: Market Drivers Ranked in Order of Impact (Benelux), 2004-2010
- Sludge Treatment Equipment Market: Market Restraints Ranked in Order of Impact (Benelux), 2004-2010
- Sludge Treatment Equipment Market: Market Forecast (Benelux), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by Technologies (Benelux), 2000-2010
- Sludge Treatment Equipment Market: Percentage of Revenues by End-users (Benelux),

2003

- Sludge Thickening Equipment Market: Market Forecast (Benelux), 2000-2010
- Sludge Thickening Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Benelux), 2003
- Sludge Digestion Equipment Market: Market Forecast (Benelux), 2000-2010
- Sludge Digestion Equipment Market: Percentage of Revenues by Technologies with Growth Prospects (Benelux), 2003
- Sludge Dewatering Equipment Market: Market Forecast (Benelux), 2000-2010
- Sludge Dewatering Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Benelux), 2003
- Sludge Drying Equipment Market: Market Forecast (Benelux), 2000-2010
- Sludge Novel Solutions Equipment Market: Market Forecast (Benelux), 2000-2010
- Sludge Novel Solutions Equipment Market: Percentage of Revenues by Technologies with Growth Prospect (Benelux), 2003
- Sludge Novel Solutions Equipment Market: Market Revenue Forecasts (Benelux), 2003
- Sludge Treatment Equipment Market: Competitive Structure (Benelux), 2003
- Sludge Treatment Equipment Market: Market Share Analysis and Trend (Benelux), 2003
- Sludge Treatment Equipment Market: Market Leaders by Technology Segment (Benelux), 2003
- Sludge Treatment Equipment Market: Market Leaders by Technology Segment (Benelux), 2003

Chapter 11

- Sludge Treatment Equipment Market: Percent of Sludge Volumes by Disposal Channel (Alpine), 2003-2010
- Sludge Treatment Equipment Market: Percent of Sludge Volumes by Disposal Channel (Ireland), 2003-2010
- Sludge Treatment Equipment Market: Percent of Sludge Volumes by Disposal Channel (Greece), 2003-2010
- Sludge Treatment Equipment Market: Market Drivers Ranked in Order of Impact Rest-of-Europe), 2004-2010
- Sludge Treatment Equipment Market: Market Restraints Ranked in Order of Impact Rest-of-Europe), 2004-2010
- Sludge Treatment Equipment Market: Market Forecast (Rest-of-Europe), 2000-2010
- Sludge Treatment Equipment Market: Competitive Forecast and Leaders by Region (Rest-of-Europe), 2003

Ordering Information

Please print out this form, complete your details and fax it to Frost & Sullivan:

Americas & Asia Pacific:

FAO Sales Department,
7550 West Interstate 10, Suite 400
San Antonio, Texas 78229-5616. USA
Fax: 888.690.3329

EMEA:

FAO Sales Department,
Sullivan House, 4 Grosvenor Gardens
London SW1W 0DH. UK
Fax: +44(0)20 7730 3343

SERVICE ORDERED

I would like to order a copy of:

European Sludge Treatment Equipment Markets (B345-01-00-00-00)

YOUR DETAILS

Name _____	Address _____
Title _____	_____
Company _____	_____
Telephone _____	State/Province _____
Fax _____	Zip/Postal Code _____
Email _____	Country _____

PAYMENT OPTIONS

Amount _____	Currency _____
--------------	----------------

