

Desalination & Water Sector Report

Ed 1 2018

The Desalination Market as a Segment of the Water & Waste Market



Desalination is one of many technologies for water supply. In 2018 desalination accounted for 13.9% of the capex for municipal and industrial water supply and the cumulative desalination plants delivered less than 1% of the supply of water. It is the most expensive form of delivering fresh water and it can cause serious environmental damage with discharges of brine into inland seas. So, when is it viable?

Desalination is sometimes the only solution for water supply in very demanding circumstances, either of water shortage or when ultra pure water is required for industrial process.

This report positions desalination in the maze of water flows and treatment technologies for water and waste, and examines competitive technologies.

- ◆ The water and waste sector is quantified In \$ capex at all stages of the water value chain, including desalination as a segment within the total infrastructure.
- ◆ The water value chain is analysed in four segments - **Water Supply** (withdrawal including desalination/distribution/treatment) - **Sanitation** (collection/treatment) - **Industry** (including desalination) - **Agriculture** - **Point-of-Use**.
- ◆ Desalination sales are plotted from 1972 to 2017 and forecast to 2022 in m³/d and \$ value.
- ◆ Comprehensive learning curve analysis is employed to predict price trends.
- ◆ National markets are analysed in detail for all countries using desalination.
- ◆ End-user shares are given with a tabulation of the main customers in user countries.

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- ◆ Membrane (ED, EDR & RO) and thermal (MSF, MED & VCD) desalination technologies are described, with global shares regional emphasis.
- ◆ Renewable energy desalination systems are witnessing an increasing interest worldwide and increasingly being adopted in some regions.
- ◆ Municipal and industrial wastewater treatments and their technologies are outlined and discussed, as recycling competitors to desalination supply.
- ◆ The costs of desalination are analysed with the factors influencing them, past trends plotted and future projections made.
- ◆ Peak Salt - the environmental impact of desalination, is having a critical impact on some inland seas and waterways, notably the Red Sea and Persian Gulf.
- ◆ Desalination, like other major industrial processes, has environmental impacts that must be understood and mitigated.
- ◆ Future desalination technologies are outlined.
- ◆ The three French giants water and waste companies are profiled; Veolia, Suez and Saur.
- ◆ More than 150 participants in the industrial water treatment chemicals market in North America are listed.
- ◆ The 25 top desalination companies are listed.
- ◆ Leading reverse osmosis membrane manufacturers are listed, with materials, configuration (hollow, plated, spiral) and application.

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Euan Blauvelt
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