

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOALS AND OBJECTIVES.....	1
REASONS FOR DOING THE STUDY	1
INTENDED AUDIENCE.....	2
SCOPE AND FORMAT OF REPORT	2
METHODOLOGY	2
INFORMATION SOURCES.....	3
ANALYST CREDENTIALS.....	3
RELATED BCC REPORTS	3
BCC ONLINE SERVICES.....	3
DISCLAIMER	4
 CHAPTER TWO: EXECUTIVE SUMMARY.....	 5
EXECUTIVE SUMMARY.....	5
EXECUTIVE SUMMARY (CONTINUED)	6
EXECUTIVE SUMMARY (CONTINUED)	7
EXECUTIVE SUMMARY (CONTINUED)	8
<i>SUMMARY TABLE MARKET SIZE AND GROWTH FOR UV DISINFECTION EQUIPMENT BY END USE, THROUGH 2016 (\$ MILLIONS)</i>	 9
<i>SUMMARY FIGURE MARKET SIZE AND GROWTH FOR UV DISINFECTION EQUIPMENT BY END USE, 2000-2016 (\$ MILLIONS)</i>	 9
 CHAPTER THREE: OVERVIEW	 10
OVERVIEW.....	10
<i>TABLE 1 CATEGORIES OF UV LIGHT</i>	11
<i>TABLE 2 A BRIEF TIMELINE OF UV TECHNOLOGY</i>	11
<i>TABLE 2 (CONTINUED)</i>	12
APPLICATIONS FOR UV	12
<i>TABLE 3 APPLICATIONS FOR UV</i>	12
FACTORS DRIVING GROWTH OF THE UV EQUIPMENT MARKET	13
UV EQUIPMENT.....	14
UV LAMPS	14
<i>TABLE 4 UV LAMP TYPES</i>	14
Mercury Vapor Lamps.....	15
Low-Pressure Mercury UV Lamps.....	16
Low-Pressure, High-Output	16
Medium-Pressure Mercury UV Lamps	16
<i>TABLE 5 TYPICAL CHARACTERISTICS OF MERCURY UV LAMPS</i>	17
Metal Halide Lamps	18
Xenon Lamps	18
Excimer Lamps	18
LEDs.....	18

LAMP BALLASTS.....	19
<i>TABLE 6 COMPARISON OF MAGNETIC AND ELECTRONIC BALLASTS</i>	<i>20</i>
LAMP SLEEVES.....	20
CLEANING SYSTEMS.....	21
SENSORS.....	22
UVT ANALYZERS.....	22
OTHER.....	23
REACTORS.....	23
Lamp Configuration.....	24
Water Flow.....	24
HOW UV WORKS.....	25
DOSAGE.....	25
<i>TABLE 7 UV DOSAGE REQUIRED FOR 99.9% DISINFECTION OF VARIOUS BACTERIA (MICROWATTS-S/CM² AT 254 NM)</i>	<i>26</i>
<i>TABLE 8 UV DOSAGE REQUIRED FOR 99.9% DISINFECTION OF VARIOUS MOLD SPORES (MICROWATTS-S/CM² AT 254 NM)</i>	<i>27</i>
<i>TABLE 9 UV DOSAGE REQUIRED FOR 99.9% DISINFECTION OF VARIOUS PROTOZOA AND ALGAE (MICROWATTS-S/CM² AT 254 NM)</i>	<i>28</i>
<i>TABLE 10 UV DOSAGE REQUIRED FOR 99.9% DISINFECTION OF VARIOUS VIRUSES (MICROWATTS-S/CM² AT 254 NM)</i>	<i>28</i>
<i>TABLE 11 UV DOSAGE REQUIRED FOR 99.9% DISINFECTION OF VARIOUS YEASTS (MICROWATTS-S/CM² AT 254 NM)</i>	<i>29</i>
MAINTENANCE REQUIREMENTS FOR UV UNITS.....	29
LAMP CLEANING AND REPLACEMENT.....	29
PERFORMANCE MONITORING.....	30
CHAPTER FOUR: TRENDS AND TECHNICAL DEVELOPMENTS.....	31
MICROWAVE UV LAMPS.....	31
ADVANTAGES.....	32
DISADVANTAGES.....	33
LED LAMPS.....	33
ADVANCED OXIDATION PROCESSES (AOPS).....	34
ADVANTAGES AND DRAWBACKS OF AOPS.....	35
PULSED UV.....	36
APPLICATIONS OF PULSED UV.....	37
R&D.....	37
Surface Treatment.....	37
Water, Wastewater, and Other Liquids.....	38
Air.....	38
BALLAST WATER DISINFECTION.....	38
<i>TABLE 12 IMO STANDARDS FOR DISCHARGED BALLAST WATER</i>	<i>39</i>
EMERGING CONTAMINANTS.....	39
UV AOPS FOR EC DESTRUCTION.....	40

<i>TABLE 13 OXIDATION POTENTIALS OF COMMON OXIDANTS USED IN WATER TREATMENT</i>	40
PATENT SURVEY.....	41
BY APPLICATION.....	42
By Application (Continued).....	43
<i>TABLE 14 PATENTS BY APPLICATION (NO., %)</i>	44
<i>FIGURE 1 PATENTS BY APPLICATION (%)</i>	45
BY COMPANY.....	45
By Company (Continued).....	46
<i>TABLE 15 PATENTS BY COMPANY (NO., %)</i>	47
<i>FIGURE 2 PATENTS BY COMPANY (%)</i>	48
CHAPTER FIVE: WATER TREATMENT.....	49
MUNICIPAL WATER TREATMENT MARKET SIZE AND GROWTH.....	49
MUNICIPAL WATER TREATMENT ... (CONTINUED).....	50
RESIDENTIAL WATER TREATMENT MARKET SIZE AND GROWTH.....	51
RESIDENTIAL WATER TREATMENT ... (CONTINUED).....	52
PROCESS WATER TREATMENT MARKET SIZE AND GROWTH.....	53
SEMICONDUCTOR PROCESS WATER TREATMENT.....	53
PHARMACEUTICAL PROCESS WATER TREATMENT.....	54
COMMERCIAL WATER TREATMENT.....	55
POOL AND SPA.....	55
AQUACULTURE, AGRICULTURE.....	56
OTHER.....	57
<i>TABLE 16 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN WATER TREATMENT, THROUGH 2016 (\$ MILLIONS)</i>	58
<i>FIGURE 3 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN WATER TREATMENT, 2002-2016 (\$ MILLIONS)</i>	59
OVERVIEW.....	59
MUNICIPAL DRINKING WATER TREATMENT.....	59
UV Lamps.....	60
Reactor Types.....	61
Benefits and Drawbacks.....	61
Advantages.....	61
Disadvantages.....	62
UV Equipment.....	62
Cost, Effectiveness of UV Irradiation.....	62
<i>TABLE 17 TYPICAL UV SYSTEM SPECS (10 MGD INSTALLATION)</i>	62
RESIDENTIAL WATER TREATMENT.....	63
Residential UV Equipment.....	63
COMMERCIAL WATER TREATMENT.....	64
POOL AND SPA WATER TREATMENT.....	65
WATER FOR AGRICULTURE, AQUACULTURE.....	66
PROCESS WATER TREATMENT.....	66

Compendial Water.....	67
ULTRAPURE MICROELECTRONICS-GRADE WATER	68
OTHER PROCESS WATER	68
Other Process Water (Continued).....	69
CHAPTER SIX: WASTEWATER TREATMENT	70
WASTEWATER TREATMENT.....	70
WASTEWATER REUSE.....	70
EMERGING CONTAMINANTS	71
<i>TABLE 18 MARKET SIZE AND GROWTH OF THE UV EQUIPMENT IN</i> <i>WASTEWATER TREATMENT, THROUGH 2016 (\$ MILLIONS)</i>	72
<i>FIGURE 4 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN</i> <i>WASTEWATER TREATMENT, 2000-2016 (\$ MILLIONS)</i>	72
OVERVIEW.....	73
WASTEWATER TREATMENT	73
Primary, Secondary and Tertiary Treatment	73
WASTEWATER REUSE.....	74
LOW-QUALITY WASTEWATER DISINFECTION.....	75
<i>TABLE 19 UV TRANSMISSION WITH VARIOUS WATER TYPES (%)</i>	75
SSOs, CSOs, and Blended Effluent	76
Stormwater	76
BENEFITS AND DRAWBACKS OF UV IN WASTEWATER TREATMENT.....	77
UV EQUIPMENT.....	77
CHAPTER SEVEN: FOOD AND BEVERAGE DISINFECTION	78
FOOD AND BEVERAGE DISINFECTION.....	78
FOOD AND BEVERAGE DISINFECTION (CONTINUED)	79
<i>TABLE 20 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN</i> <i>THE FOOD AND BEVERAGE INDUSTRY, THROUGH 2016 (\$</i> <i>MILLIONS)</i>	80
<i>FIGURE 5 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN</i> <i>THE FOOD AND BEVERAGE INDUSTRY, 2000-2016 (\$ MILLIONS)</i>	81
OVERVIEW.....	81
<i>TABLE 21 APPLICATIONS FOR UV IN THE FOOD INDUSTRY</i>	82
ADVANTAGES AND DISADVANTAGES OF UV IN THE FOOD AND BEVERAGE SECTOR	82
BOTTLED WATER, OTHER BEVERAGES.....	83
Process Water Reuse	83
Flavoring Syrups	84
MARINADES, BRINES	84
SURFACE DISINFECTION OF FOODS.....	85
Meat, Poultry, and Seafood.....	85
Eggshells	85
Milk	86

Produce.....	87
SURFACE DISINFECTION OF PRODUCTION AREAS, EQUIPMENT, AND PACKAGING	88
CHAPTER EIGHT: AIR TREATMENT.....	89
AIR TREATMENT	89
AIR TREATMENT (CONTINUED).....	90
<i>TABLE 22 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN AIR TREATMENT, THROUGH 2016 (\$ MILLIONS)</i>	91
<i>FIGURE 6 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN AIR TREATMENT, 2000-2016 (\$ MILLIONS)</i>	91
OVERVIEW.....	92
INDOOR AIR POLLUTION	92
<i>TABLE 23 INDOOR AIR POLLUTANTS</i>	93
UV EQUIPMENT FOR INDOOR AIR TREATMENT	94
<i>TABLE 24 UVGI SYSTEM TYPES</i>	94
UV EQUIPMENT FOR INDOOR AIR TREATMENT (CONTINUED).....	95
UVGI LAMP TYPES	96
Configuration.....	96
APPLICATIONS FOR UV AIR DISINFECTION.....	97
HOSPITALS	97
<i>TABLE 25 NOSOCOMIAL AGENTS WITH POTENTIAL FOR AIRBORNE TRANSMISSION</i>	98
<i>TABLE 25 (CONTINUED)</i>	99
RESIDENTIAL AND COMMERCIAL	99
CLEANROOM.....	100
ELECTRIC UTILITIES	100
TRANSPORTATION.....	100
BIOTERROR AGENTS.....	101
CHAPTER NINE: SURFACE DISINFECTION	102
SURFACE DISINFECTION.....	102
<i>TABLE 26 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN SURFACE DISINFECTION, THROUGH 2016 (\$ MILLIONS)</i>	103
<i>FIGURE 7 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN SURFACE DISINFECTION, 2000-2016 (\$ MILLIONS)</i>	104
OVERVIEW.....	104
APPLICATIONS.....	105
<i>TABLE 27 APPLICATIONS FOR UV IN SURFACE DISINFECTION</i>	105
Healthcare.....	106
Medical and Dental Equipment Sterilization	106
Operating Theaters	106
Catheter Access Site	107
HVAC Cooling Coils and Drain Pans	107

Mold Inhibition and Remediation.....	108
Small Appliances	109
CHAPTER TEN: UV MARKET BY WORLD REGION	110
TABLE 28 MARKET SIZE AND GROWTH FOR UV EQUIPMENT BY WORLD REGION, THROUGH 2016 (\$ MILLIONS).....	110
FIGURE 8 MARKET SIZE AND GROWTH FOR UV EQUIPMENT BY WORLD REGION, 2000-2016 (\$ MILLIONS).....	111
MARKET SIZE AND GROWTH FOR UV DISINFECTION EQUIPMENT IN NORTH AMERICA.....	111
MARKET SIZE AND GROWTH FOR UV ... (CONTINUED)	112
TABLE 29 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN NORTH AMERICA, THROUGH 2016 (\$ MILLIONS).....	113
FIGURE 9 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN NORTH AMERICA, 2000-2016 (\$ MILLIONS).....	113
U.S.....	114
Water and Wastewater Treatment.....	114
Infrastructure Needs	114
Drinking Water	115
Wastewater	116
NSF International.....	117
TABLE 30 NSF STANDARDS	118
Process Water.....	119
Pharmaceuticals Production	119
Semiconductor Manufacturing	120
Food and Beverage	121
Air and Surface	122
CANADA.....	123
Water and Wastewater.....	124
Process Water	125
Food and Beverage	125
Air and Surface	126
MEXICO	127
Water and Wastewater.....	127
Process Water	128
Food and Beverage	129
Air and Surface	129
MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN EUROPE.....	130
WATER TREATMENT	130
Process Water	131
Wastewater	131
FOOD AND BEVERAGE.....	132
AIR AND SURFACE.....	132
TABLE 31 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN EUROPE, THROUGH 2016 (\$ MILLIONS).....	133

<i>FIGURE 10 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN EUROPE, 2000-2016 (\$ MILLIONS)</i>	134
FRANCE	134
Water and Wastewater.....	135
Process Water	135
Pharmaceuticals Production	135
Semiconductor Manufacturing.....	136
Food and Beverage	136
Air and Surface.....	137
GERMANY	137
Water and Wastewater.....	138
Process Water	139
Pharmaceuticals Production	139
Semiconductor Manufacturing.....	140
Food and Beverage	140
Air and Surface.....	141
ITALY	141
Water and Wastewater.....	142
Process Water	142
Pharmaceuticals Production	142
Semiconductor Manufacturing.....	143
Food and Beverage	143
Air and Surface.....	144
IRELAND	144
Water and Wastewater.....	145
Process Water	146
Pharmaceuticals Production	146
Semiconductor Manufacturing.....	146
Food and Beverage	147
Air and Surface.....	147
SPAIN	147
Water and Wastewater.....	148
Food and Beverage	149
Air and Surface.....	149
U.K.	150
Water and Wastewater.....	150
Process Water	151
Pharmaceuticals Production	151
Semiconductor Manufacturing.....	152
Food and Beverage	153
Air and Surface.....	153
MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN THE ASIA-PACIFIC REGION.....	154
WATER TREATMENT	154

Residential Water Treatment	155
Process Water Treatment.....	155
Wastewater Treatment	156
FOOD AND BEVERAGE.....	157
AIR AND SURFACE.....	157
<i>TABLE 32 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN</i> <i>THE ASIA-PACIFIC REGION, THROUGH 2011 (\$ MILLIONS).....</i>	<i>158</i>
<i>FIGURE 11 MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN</i> <i>THE ASIA-PACIFIC REGION, 2000-2016 (\$ MILLIONS)</i>	<i>159</i>
AUSTRALIA.....	159
Water and Wastewater.....	160
Process Water	161
Food and Beverage	161
Air and Surface.....	162
CHINA.....	162
Water and Wastewater.....	163
Water and Wastewater (Continued)	164
Process Water	165
Pharmaceuticals Production	165
Semiconductor Manufacturing.....	166
Food and Beverage	166
Air and Surface.....	167
INDIA	168
Water and Wastewater.....	168
Process Water	169
Pharmaceuticals Production	169
Semiconductor Manufacturing.....	170
Food and Beverage	171
Air and Surface.....	172
JAPAN	172
Water and Wastewater.....	173
Process Water	174
Pharmaceuticals Production	174
Semiconductor Manufacturing.....	175
Food and Beverage	175
Air and Surface.....	176
KOREA	176
Water and Wastewater.....	177
Process Water	178
Pharmaceuticals Production	178
Semiconductor Manufacturing.....	178
Food and Beverage	179
Air and Surface.....	179
SINGAPORE	180

Water and Wastewater.....	180
Process Water	181
Pharmaceuticals Production	181
Semiconductor Manufacturing.....	181
Food and Beverage	182
Air and Surface.....	182
MARKET SIZE AND GROWTH FOR UV EQUIPMENT IN THE REST OF WORLD.....	183
MARKET SIZE AND GROWTH FOR UV ...(CONTINUED)	184
<i>TABLE 33 MARKET SIZE AND GROWTH FOR UV DISINFECTION EQUIPMENT IN THE REST OF THE WORLD, THROUGH 2016 (\$ MILLIONS)</i>	185
<i>FIGURE 12 MARKET SIZE AND GROWTH FOR UV DISINFECTION EQUIPMENT IN THE REST OF THE WORLD, 2000-2016 (\$ MILLIONS)</i>	185
CHAPTER ELEVEN: INDUSTRY STRUCTURE.....	186
INDUSTRY STRUCTURE	186
INDUSTRY STRUCTURE (CONTINUED)	187
<i>TABLE 34 TOTAL GLOBAL WATER MARKET REVENUES, BY SECTOR (\$ BILLIONS, 2010)</i>	188
COMPANY PROFILES	189
ABIOTEC UV TECHNOLOGY.....	189
ADVANCED UV, INC.....	189
AIR OASIS.....	190
AIRWISE	190
ALFA LAVAL	191
ALLERAIR INDUSTRIES	191
AMERICAN AIR & WATER.....	192
AMERICAN ULTRAVIOLET	192
HALMA GROUP	193
Drinking Water Systems.....	193
Wastewater Systems	194
ATLANTIC ULTRAVIOLET CORP.	194
ATLANTIUM TECHNOLOGY LTD.....	195
Atlantium UV Systems.....	195
AUSTRALIAN ULTRA VIOLET SERVICES (OPERATIONS) PTY LTD.	195
BIO-UV	196
CALGON CARBON CORP.	196
Water Treatment Systems	197
Wastewater Treatment Systems.....	197
CARRIER CORP.	198
CLEAN WATER SYSTEMS INTERNATIONAL (CWS).....	198
CULLIGAN INTERNATIONAL.....	199

DIEAU EDAFIM	199
DUST FREE	200
EMPEROR AQUATICS INC.	200
ENGINEERED TREATMENT SYSTEMS (ETS)	201
ESPRING.....	201
ETA PLUS ELECTRONIC GMBH.....	202
EUREKA FORBES LTD.....	202
FIRST LIGHT TECHNOLOGIES, INC.	203
FUNATECH	203
GE LIGHTING	204
GERMITEC	204
GREENWAY WATER TECHNOLOGIES.....	204
HERAEUS NOBLELIGHT	205
Heraeus UV Equipment	205
HYDROPHOTON INC.....	206
INFILCO DEGREMONT, INC.....	206
Water Treatment Systems	207
LIGHT PROCESS	207
LIGHT SOURCES, INC.....	208
WEBSITE: WWW.LIGHT-SOURCES.COM	208
LIT TECHNOLOGY.....	208
UV Systems for Air and Surface Treatment	208
UV Systems for Water and Wastewater Treatment	209
LUMALIER	209
MAESTRO PRESSURE COOLERS	209
MERIDIAN DESIGN, INC.	210
NATURE FLOW SYSTEMS PTY. LTD,	210
NEOTEC UV	211
Neotec UV Systems	211
PANASIA CO. LTD	212
PHILIPS	212
REMOTELIGHT, INC. (RLI).....	213
SENTRY ULTRAVIOLET, INC.....	213
SEVERN TRENT SERVICES.....	214
UltraDynamics UV	214
MicroDynamics UV.....	215
SIEMENS AG.....	215
Osram.....	215
Wallace & Tiernan.....	216
Water	216
Process Water.....	217
SITA SRL.....	217
SKJØLSTRUP & GRØNBORG APS-ULTRAAQUA	218
Ultraaqua Systems	218

SUREPURE	218
STERI-BEAM SYSTEMS GMBH	219
STERIL-AIRE INC.....	219
Steril-Aire UV Systems	220
SVAROG	220
TANA WATER.....	221
TROJAN UV	221
Drinking Water.....	222
Wastewater	222
Aquafine	223
UVMMax POE and POU Sterilizers	223
Viqua	224
Trojan Marinex	224
ULTRA-SUN TECHNOLOGIES, INC.	224
ULTRAVIOLET DEVICES INC. (UVDI).....	225
USHIO, INC.	225
UVDYNAMICS.....	226
UV PURE.....	226
UV-TECHNIK	227
WATERHEALTH INTERNATIONAL	227
WATERLOGIC INTERNATIONAL	228
Waterlogic UV Systems.....	228
WEDECO ITT.....	229
Wedeco UV Lamps.....	229
BX, LBX Series Systems	230
K-Series.....	230
Aquada	230
WÄRTSILÄ.....	230
WONDER LIGHT INDUSTRY MACHINERY ELECTRONIC PRODUCTS.....	231
XENON CORP.....	231

APPENDIX	232
<i>TABLE 35 PATENT SURVEY (JUNE 14, 2001-JUNE 13, 2011)</i>	232
<i>TABLE 35 (CONTINUED)</i>	233
<i>TABLE 35 (CONTINUED)</i>	234
<i>TABLE 35 (CONTINUED)</i>	235
<i>TABLE 35 (CONTINUED)</i>	236
<i>TABLE 35 (CONTINUED)</i>	237