

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOAL AND OBJECTIVES	1
REASONS FOR DOING THE STUDY	1
INTENDED AUDIENCE.....	1
SCOPE OF REPORT	2
INFORMATION SOURCES.....	2
ANALYST CREDENTIALS.....	2
RELATED BCC PUBLICATIONS	3
BCC ONLINE SERVICES.....	3
DISCLAIMER	3
 CHAPTER TWO: SUMMARY.....	 4
SUMMARY.....	4
SUMMARY (CONTINUED)	5
SUMMARY (CONTINUED)	6
<i>SUMMARY TABLE GLOBAL MARKET FOR SEAWATER AND BRACKISH WATER DESALINATION PLANTS, THROUGH 2015 (\$ MILLIONS)</i>	 7
<i>SUMMARY FIGURE GLOBAL MARKET FOR SEAWATER AND BRACKISH WATER DESALINATION PLANTS, 2000–2015 (\$ MILLIONS)</i>	 7
 CHAPTER THREE: TECHNOLOGY OVERVIEW.....	 8
WATER QUALITY.....	8
SAFE DRINKING WATER STANDARDS.....	8
WATER QUANTITY	9
WATER SALINITY.....	10
<i>TABLE 1 WATER SALINITY AND SUITABILITY FOR HUMAN CONSUMPTION (MG/L)</i>	 11
<i>TABLE 2 SALT CONCENTRATIONS OF VARIOUS GLOBAL WATERS (PPM)</i>	 12
<i>TABLE 3 WATER HARDNESS</i>	12
SOURCE WATERS USED FOR DESALINATION.....	13
<i>TABLE 4 TOTAL WORLD DESALINATION CAPACITY BY SOURCE WATER TYPE, 2010 (%)</i>	 13
<i>FIGURE 1 TOTAL WORLD DESALINATION CAPACITY BY SOURCE WATER TYPE (%)</i>	 14
DESALTED WATER END USES	14
<i>TABLE 5 GLOBAL DESALTED WATER END USES AS A PERCENTAGE OF TOTAL CAPACITY (%)</i>	 14
<i>FIGURE 2 GLOBAL DESALTED WATER END USES AS A PERCENTAGE OF TOTAL CAPACITY (%)</i>	 15
DESALINATION TECHNOLOGIES.....	15
BRIEF HISTORY OF DESALINATION	15
Brief History of Desalination (Continued).....	16

<i>FIGURE 3 DESALINATION TECHNOLOGIES</i>	17
MEMBRANE TECHNOLOGIES.....	17
THERMAL TECHNOLOGIES	18
COMPARISON OF THERMAL AND MEMBRANE TECHNOLOGIES.....	19
<i>TABLE 6 COMPARISON OF PROCESS CHARACTERISTICS</i>	19
COMPARATIVE COSTS OF DESALINATION TECHNOLOGIES.....	20
<i>TABLE 7 GLOBAL COMPARATIVE COSTS OF THERMAL AND MEMBRANE TECHNOLOGIES (\$/M³)</i>	21
GLOBAL DESALINATION INSTALLATIONS	21
<i>TABLE 8 GLOBAL INSTALLATIONS BY NUMBER OF PLANTS AND CAPACITY, 1945–2009 (M³/D)</i>	22
<i>FIGURE 4 GLOBAL INSTALLATIONS BY CAPACITY, 1945–2009 (M³)</i>	22
<i>TABLE 9 LARGEST DESALINATION PLANTS BY CAPACITY, COMMISSIONED OR CONTRACTED, JULY 2010</i>	23
<i>TABLE 10 GLOBAL MARKET SHARE BY TECHNOLOGY TYPE, 2010 (%)</i>	24
<i>FIGURE 5 GLOBAL MARKET SHARE BY TECHNOLOGY TYPE, 2010 (%)</i>	24
CHAPTER FOUR: MEMBRANE TECHNOLOGIES	25
REVERSE OSMOSIS.....	25
<i>TABLE 11 MEMBRANE MANUFACTURERS AND PRODUCT TYPES</i>	26
NANOFILTRATION	26
ELECTRODIALYSIS.....	27
COST OF TECHNOLOGIES	28
CAPITAL COSTS	28
<i>TABLE 12 GLOBAL CAPITAL COSTS OF MEMBRANE DESALINATION BY TECHNOLOGY TYPE AND PLANT SIZE (AVG. \$/GAL.)</i>	28
OPERATING COSTS	28
Operating Costs (Continued)	29
<i>TABLE 13 COST ALLOCATION OF DESALINATING BRACKISH WATER WITH RO (%)</i>	30
<i>FIGURE 6 COST ALLOCATION OF DESALINATING BRACKISH WATER WITH RO (%)</i>	30
<i>TABLE 14 COST ALLOCATION OF DESALINATING SEAWATER WITH RO (%)</i>	31
<i>FIGURE 7 COST ALLOCATION OF DESALINATING SEAWATER WITH RO (%)</i>	31
COST TRENDS	31
<i>TABLE 15 GLOBAL COST TRENDS FOR MEMBRANE DESALINATION, INCLUDING DEBT SERVICE AND OPERATING EXPENSES, 1980–2010 (\$/1,000 GALS)</i>	32

<i>FIGURE 8 GLOBAL COST TRENDS FOR MEMBRANE DESALINATION, INCLUDING DEBT SERVICE AND OPERATING EXPENSES, 1980–2010 (\$/1,000 GALS)</i>	32
<i>TABLE 16 SEAWATER ELEMENT COST, 1978–2005 (\$/1,000 GALS)</i>	33
<i>FIGURE 9 SEAWATER ELEMENT COST, 1978–2005 (\$/1,000 GALS)</i>	33
<i>TABLE 17 GLOBAL SEAWATER DESALINATION COST REDUCTIONS</i>	34
<i>FIGURE 10 GLOBAL SEAWATER DESALINATION COST REDUCTIONS (\$/1,000 GALS. (3.8 M³))</i>	34
<i>MARKET SHARE</i>	35
<i>TABLE 18 GLOBAL MEMBRANE MANUFACTURER MARKET SHARES, 2009 (%)</i>	35
<i>FIGURE 11 GLOBAL MEMBRANE MANUFACTURER MARKET SHARES, 2010 (%)</i>	36
<i>MARKET VALUE BY MEMBRANE TECHNOLOGY TYPE</i>	36
<i>TABLE 19 GLOBAL MARKET FORECAST BY MEMBRANE TECHNOLOGY TYPE, THROUGH 2015 (\$ MILLIONS)</i>	37
<i>FIGURE 12 GLOBAL MARKET FORECAST BY MEMBRANE TECHNOLOGY TYPE, 2000–2015 (\$ MILLIONS)</i>	38
CHAPTER FIVE: THERMAL TECHNOLOGIES	39
MULTISTAGE FLASH DISTILLATION	39
COST	40
<i>TABLE 20 COST ALLOCATION OF DESALINATED WATER PRODUCTION WITH MSF (%)</i>	40
<i>FIGURE 13 COST ALLOCATION OF DESALINATED WATER PRODUCTION WITH MSF (%)</i>	41
<i>TABLE 21 GLOBAL MSF DESALINATION COST TRENDS, 1955–2010 (\$/GAL)</i>	41
<i>FIGURE 14 GLOBAL MSF DESALINATION COST TRENDS, 1955–2010 (\$/GAL)</i>	42
MULTI-EFFECT DISTILLATION	42
COST	43
<i>TABLE 22 COST ALLOCATION OF DESALINATED WATER PRODUCTION WITH MED (%)</i>	44
<i>FIGURE 15 COST ALLOCATION OF DESALINATED WATER PRODUCTION WITH MED (%)</i>	44
VAPOR COMPRESSION	44
MARKET VALUE BY THERMAL TECHNOLOGY TYPE	45
MARKET VALUE BY THERMAL ... (CONTINUED)	46
<i>TABLE 23 GLOBAL MARKET FORECAST BY THERMAL TECHNOLOGY TYPE, THROUGH 2015 (\$ MILLIONS)</i>	47
<i>FIGURE 16 GLOBAL MARKET FORECAST BY THERMAL TECHNOLOGY TYPE, 2000–2015 (\$ MILLIONS)</i>	47

CHAPTER SIX: OTHER TECHNOLOGIES	48
CRYSTALLIZATION	48
FREEZING	48
GAS HYDRATE PROCESSES	49
MEMBRANE DISTILLATION	49
MEMSTILL	50
SOLAR HUMIDIFICATION	51
FLOW-THROUGH CAPACITOR	52
ION EXCHANGE.....	52
MARKET VALUE OF OTHER TECHNOLOGIES	53
<i>TABLE 24 GLOBAL MARKET FORECAST FOR OTHER</i>	
<i>TECHNOLOGIES, THROUGH 2015 (\$ MILLIONS)</i>	54
<i>FIGURE 17 GLOBAL MARKET FORECAST FOR OTHER</i>	
<i>TECHNOLOGIES, 2000–2015 (\$ MILLIONS)</i>	54
CHAPTER SEVEN: WORLD MARKETS FOR DESALINATION	55
<i>TABLE 25 GLOBAL WATER WITHDRAWALS BY SECTOR (%)</i>	55
<i>FIGURE 18 GLOBAL WATER WITHDRAWALS BY SECTOR (%)</i>	56
<i>TABLE 26 ABSOLUTE WATER STRESS OR SHORTAGE IN THE 20</i>	
<i>MOST AFFECTED COUNTRIES, PROJECTED TO 2025</i>	57
<i>TABLE 27 WATER STRESS OR SHORTAGE IN THE 20 MOST</i>	
<i>POPULOUS COUNTRIES, PROJECTED TO 2025</i>	58
WORLD MARKET BY REGION	58
<i>TABLE 28 DESALINATION CAPACITY BY TECHNOLOGY AND</i>	
<i>WORLD REGION, 2009</i>	59
<i>FIGURE 19 DESALINATION CAPACITY BY TECHNOLOGY AND</i>	
<i>WORLD REGION, 2009 (M³/D)</i>	59
<i>TABLE 29 COUNTRIES WITH THE LARGEST INSTALLED</i>	
<i>DESALINATION CAPACITY, 2009 (M³/D)</i>	60
<i>FIGURE 20 COUNTRIES WITH THE LARGEST INSTALLED</i>	
<i>DESALINATION CAPACITY, 2009 (M³/D)</i>	60
WORLD MARKET BY REGION (CONTINUED).....	61
<i>TABLE 30 MARKET VALUE BY GLOBAL REGION, THROUGH 2015 (\$</i>	
<i>MILLIONS)</i>	62
<i>FIGURE 21 MARKET VALUE BY GLOBAL REGION, 2000–2015 (\$</i>	
<i>MILLIONS)</i>	62
U.S. AND CANADA	63
Economic Trends.....	63
Water Needs.....	63
<i>TABLE 31 WATER DISTRIBUTION IN THE U.S. BY SECTOR</i>	
<i>(BILLION GPD/%)</i>	64
<i>FIGURE 22 WATER DISTRIBUTION IN THE U.S. BY SECTOR (%)</i>	64
<i>TABLE 32 TOTAL U.S. FRESHWATER WITHDRAWALS BY STATE,</i>	
<i>2005 (M³/D)</i>	65
<i>TABLE 32 (CONTINUED)</i>	66

Desalination Capacity	66
<i>TABLE 33 U.S. DESALINATION CAPACITY SHARE BY SOURCE</i>	
<i>WATER TYPE (%)</i>	67
<i>FIGURE 23 U.S. DESALINATION CAPACITY SHARE BY SOURCE</i>	
<i>WATER TYPE (%)</i>	68
<i>TABLE 34 U.S. DESALINATION CAPACITY SHARE BY</i>	
<i>TECHNOLOGY TYPE, 2010 (%)</i>	68
<i>FIGURE 24 U.S. DESALINATION CAPACITY SHARE BY</i>	
<i>TECHNOLOGY TYPE (%)</i>	69
<i>TABLE 35 U.S. STATES WITH THE LARGEST INSTALLED</i>	
<i>DESALINATION CAPACITY, 2010</i>	69
<i>TABLE 36 U.S. DESALTED WATER END USES AS A PERCENTAGE</i>	
<i>OF TOTAL CAPACITY, 2010 (%)</i>	70
<i>FIGURE 25 U.S. DESALTED WATER END USES AS A PERCENTAGE</i>	
<i>OF TOTAL CAPACITY, 2010 (%)</i>	70
OUTLOOK.....	71
Heartland.....	71
Mid-Atlantic.....	71
<i>FIGURE 26 POTENTIALLY USABLE WATER FROM U.S. SALINE</i>	
<i>AQUIFERS</i>	72
Oil, Gas, and Coal Basins.....	72
Inland Urban Areas.....	73
Coastal Urban Areas	73
Florida	74
The Tampa Bay Experience	74
California.....	75
<i>FIGURE 27 CALIFORNIA'S PROPOSED SEAWATER DESALINATION</i>	
<i>PLANTS</i>	76
Texas	76
Texas (Continued).....	77
<i>FIGURE 28 PROPOSED DESALINATION PLANTS IN TEXAS</i>	78
VALUE OF THE U.S./CANADIAN MARKET.....	78
VALUE OF THE U.S./CANADIAN MARKET (CONTINUED)	79
<i>TABLE 37 U.S./CANADA MARKET VALUE BY TECHNOLOGY TYPE,</i>	
<i>THROUGH 2015 (\$ MILLIONS)</i>	80
<i>FIGURE 29 U.S./CANADA MARKET VALUE BY TECHNOLOGY TYPE,</i>	
<i>2000–2015 (\$ MILLIONS)</i>	81
EUROPE.....	81
ECONOMIC TRENDS	81
WATER NEEDS	82
SPAIN	82
Outlook.....	83
ITALY	83
Outlook.....	84

MALTA	84
Outlook.....	85
CYPRUS	85
Outlook.....	85
GREECE.....	86
Outlook.....	87
U.K.	87
Outlook.....	88
INSTALLED CAPACITY	88
<i>TABLE 38 EUROPE'S INSTALLED CAPACITY BY COUNTRY, 2009</i>	
(<i>M³/D</i>)	89
<i>FIGURE 30 EUROPE'S INSTALLED CAPACITY BY COUNTRY, 2010</i>	
(<i>M³/D</i>)	89
VALUE OF THE EUROPEAN MARKET	89
Value of the European Market (Continued).....	90
<i>TABLE 39 VALUE OF THE EUROPEAN MARKET BY TECHNOLOGY</i>	
<i>TYPE, THROUGH 2015 (\$ MILLIONS)</i>	91
<i>FIGURE 31 VALUE OF THE EUROPEAN MARKET BY TECHNOLOGY,</i>	
<i>2000–2015 (\$ MILLIONS)</i>	91
MIDDLE EAST/AFRICA	92
ECONOMIC TRENDS	92
WATER NEEDS	93
SAUDI ARABIA	93
Outlook.....	94
UAE.....	95
Outlook.....	95
KUWAIT	96
Outlook.....	96
BAHRAIN	97
Outlook.....	97
ALGERIA.....	98
Outlook.....	98
LIBYA	99
Outlook.....	100
JORDAN	100
Outlook.....	101
QATAR.....	102
Outlook.....	102
EGYPT	103
Outlook.....	103
ISRAEL.....	104
Outlook.....	105
TUNISIA.....	106
Outlook.....	106

TURKEY.....	106
Outlook.....	107
SOUTH AFRICA.....	107
Outlook.....	107
VALUE OF THE MIDDLE EAST/AFRICA MARKET.....	108
Value of the Middle East/... (Continued).....	109
Value of the Middle East/... (Continued).....	110
<i>TABLE 40 VALUE OF THE MIDDLE EAST/AFRICA MARKET BY TECHNOLOGY TYPE, THROUGH 2015 (\$ MILLIONS)</i>	<i>111</i>
<i>FIGURE 32 VALUE OF THE MIDDLE EAST/AFRICA MARKET BY TECHNOLOGY TYPE, 2000–2015 (\$ MILLIONS)</i>	<i>111</i>
ASIA-PACIFIC.....	112
ECONOMIC TRENDS.....	112
WATER NEEDS.....	112
AUSTRALIA.....	112
Outlook.....	113
CHINA.....	114
Outlook.....	115
INDIA.....	116
Outlook.....	117
INDONESIA.....	117
Outlook.....	118
JAPAN.....	118
Outlook.....	119
THE PHILIPPINES.....	119
Outlook.....	120
SINGAPORE.....	120
Outlook.....	121
TAIWAN.....	122
Outlook.....	122
VALUE OF THE ASIA-PACIFIC MARKET.....	123
<i>TABLE 41 VALUE OF THE ASIA-PACIFIC MARKET BY TECHNOLOGY TYPE, THROUGH 2015 (\$ MILLIONS)</i>	<i>124</i>
<i>FIGURE 33 VALUE OF THE ASIA-PACIFIC MARKET BY TECHNOLOGY TYPE, 2000–2015 (\$ MILLIONS)</i>	<i>125</i>
LATIN AMERICA/CARIBBEAN.....	125
ECONOMIC TRENDS.....	125
WATER NEEDS.....	125
THE BAHAMAS.....	126
Outlook.....	126
CHILE.....	127
Outlook.....	127
JAMAICA.....	128
Outlook.....	129

MEXICO	129
Outlook.....	130
VALUE OF THE LATIN AMERICA/CARIBBEAN MARKET	130
Value of the Latin America/... (Continued).....	131
<i>TABLE 42 LATIN AMERICA/CARIBBEAN MARKET VALUE BY TECHNOLOGY TYPE, THROUGH 2015 (\$ MILLIONS)</i>	132
<i>FIGURE 34 LATIN AMERICA/CARIBBEAN MARKET VALUE BY TECHNOLOGY TYPE, 2000–2015 (\$ MILLIONS)</i>	132
CHAPTER EIGHT: PATENT ANALYSIS.....	133
PATENTS BY TECHNOLOGY TYPE	133
<i>TABLE 43 PATENT SHARE BY TECHNOLOGY TYPE (NUMBER & %)</i>	134
<i>FIGURE 35 PATENT SHARE BY TECHNOLOGY TYPE (%)</i>	135
PATENTS BY COMPANY.....	135
<i>TABLE 44 PATENT SHARE BY COMPANY/INDIVIDUAL PATENT HOLDER (%)</i>	136
<i>FIGURE 36 PATENT SHARE BY COMPANY/INDIVIDUAL PATENT HOLDER (%)</i>	137
CHAPTER NINE: TECHNICAL INNOVATIONS AND RESEARCH	
TRENDS	138
TECHNICAL INNOVATIONS AND RESEARCH TRENDS.....	138
LARGE-AREA MODULES.....	139
NF PRETREATMENT FOR THERMAL DESALINATION	139
RESEARCH TRENDS	140
DESALINATION AND WATER PURIFICATION ROADMAP	140
<i>TABLE 45 DESALINATION AND WATER PURIFICATION ROADMAP: NATIONAL NEEDS AND RECOMMENDED R&D</i>	141
<i>TABLE 45 (CONTINUED)</i>	142
<i>TABLE 45 (CONTINUED)</i>	143
LONG BEACH METHOD.....	143
AFFORDABLE DESALINATION COALITION.....	144
ION CONCENTRATION	144
NEW MEMBRANE MATERIALS	144
Organic/Inorganic Nanocomposites	145
Carbon Nanotube Membranes	145
Boron Nitride Nanotube Membranes	146
Aquaporins	147
Oxidant-Resistant Membranes	148
Chlorine-Tolerant Materials	149
Surface-Structured, Fouling-Resistant Membrane Materials.....	149
NEW ENERGY OPTIONS.....	150
Renewable Energy Sources	150
<i>TABLE 46 RECOMMENDED RES/DESALINATION COMBINATIONS</i>	150

<i>TABLE 46 (CONTINUED)</i>	151
Solar	152
Concentrated Solar Power (CSP).....	152
Wind	153
Wave	153
Nuclear	154
Nuclear Desalination Projects	154
Nuclear ...(Continued)	155
Nuclear ...(Continued)	156
Hybrid RO/Thermal Plants	157
BRINE DISPOSAL	158
EMERGING TREATMENT METHODS.....	158
Beneficial Brine Reuse	159
Concentrate Minimization	159
Zero Liquid Discharge	160
Recovery and Resale of Salts in Desalination Brine	160
CHAPTER TEN: INDUSTRY STRUCTURE	161
INDUSTRY STRUCTURE	161
MARKET SHARE	162
<i>TABLE 47 DESALINATION PLANT SUPPLIER MARKET SHARE, 2009</i> <i>(%)</i>	162
<i>FIGURE 37 DESALINATION PLANT SUPPLIER MARKET SHARES,</i> <i>2010 (%)</i>	163
COMPANY PROFILES	163
ABENGOA/BEFESA AGUA	163
ACCIONA AGUA/ACCIONA SA	164
ACE WATER TREATMENT CO., LTD.....	165
AFTON PUMPS, INC.	165
AHMED ABDEL WARITH CONSULTING ENGINEERS	166
ALFA LAVAL	166
AMERICAN ENGINEERING SERVICES (AES)	166
AES Arabia, Ltd.	167
AL KAWTHER INDUSTRIES, LTD./AL MURJAN GROUP.....	167
AQUALIA	168
AQUALYNG/LYNG GROUP	168
AQUATECH INTERNATIONAL CORP.	169
AquaChem ICD.....	169
ACWA (ARABIAN COMPANY FOR WATER & POWER DEVELOPMENT) POWER INTERNATIONAL	169
BIWATER, PLC.....	170
Bewater AEWT, Inc.	170
CADAGUA/FERROVIAL GROUP.....	171
CANDESAL WATER SYSTEMS.....	171
CHRIST WATER TECHNOLOGY GROUP/ GLV	172

Aqua Engineering GmbH	172
CONSOLIDATED WATER CO., LTD.	173
CORODEX INDUSTRIES.....	174
CULLIGAN HELLAS.....	174
DANFOSS A/S RO SOLUTIONS	175
DOOSAN HEAVY INDUSTRIES & CONSTRUCTION	175
DOW WATER SOLUTIONS	176
DÜCHTING PUMPS.....	177
EBARA CORP.	177
ENERGY RECOVERY, INC.	178
FICHTNER GMBH	179
FLOWSERVE	179
FLUID EQUIPMENT DEVELOPMENT CO.....	180
FYBROC PUMPS	180
GENERAL ELECTRIC	181
GRAHAMTEK SYSTEMS	182
GRUNDFOS GROUP	183
HITACHI Zosen CORP.	183
HYFLUX, LTD.	184
IDE TECHNOLOGIES, LTD.....	184
ILF CONSULTING ENGINEERS.....	185
INDAR PUMP/INGETTEAM CORP.	186
IMPREGILO GROUP/FISIA ITALIMPIANTI.....	186
INIMA MEDIO AMBIENTE/OHL	187
INTERNATIONAL POWER.....	187
ION EXCHANGE (INDIA), LTD.	188
ITOCHU CORP.	188
ITT WATER & WASTEWATER/ITT INDUSTRIES	189
JGC CORP.	190
KINDASA WATER SERVICES	190
KOCH MEMBRANE SYSTEMS	191
KSB GROUP.....	192
KULJIAN CORP.	192
KURITA WATER INDUSTRIES.....	193
LAHMEYER INTERNATIONAL GMBH.....	193
MARUBENI CORP.	194
MALAKOFF	194
METITO (OVERSEAS), LTD.....	195
MITSUBISHI HEAVY INDUSTRIES	195
MITSUI & CO., LTD.....	196
MUBADALA DEVELOPMENT CO.	196
NATCO GROUP/CAMERON NTERNATIONAL CORP	197
NITTO DENKO	197
Hydranautics	197

Hydranautics (Continued)	198
ORGANO CORP.	199
OSMOFLO	199
PB POWER	199
POSEIDON RESOURCES CORP.	200
PUMP ENGINEERING, INC.	201
REGGIANE CRANES & PLANTS DIVISION/ FANTUZZI GROUP	201
SADYT	202
SALT SEPARATION SERVICES, LTD.	202
SASAKURA ENGINEERING	203
SAUDI OGER, LTD.	204
SEMBCORP UTILITIES PTE, LTD.	204
SEPARATION PROCESSES, INC.	205
SETE ENERGY SAUDI FOR INDUSTRIAL PROJECTS, LTD. (SETE ENERGY)	206
SEVERN TRENT SERVICES	206
SIEMENS WATER TECHNOLOGIES	207
SNAMPROGETTI S.P.A./ENI SAIPEM	208
SNC LAVALIN	208
SOGEX OMAN CO., LLC	209
SUMITOMO CORP.	209
SUEZ	210
SULZER PUMPS/SULZER CORP.	210
TAM ENVIRONMENTAL SERVICES/TAM GROUP	211
TEDAGUA/COBRA GROUP (ACS)	211
TENAGA NASIONAL BERHAD	212
TORAY INDUSTRIES	212
TORISHIMA PUMP MANUFACTURING CO., LTD.	213
TOYOBO CO., LTD.	214
UEM, INC.	214
VEOLIA WATER SOLUTIONS & TECHNOLOGIES	215
WATER ENGINEERING & MANAGEMENT SERVICES	216
WETICO	216
WOONGJIN CHEMICAL	216
Woongjin Chemical (Continued)	217
APPENDIX PATENT SURVEYS	218
TABLE 48 PATENT SURVEY, 2005	218
TABLE 48 (CONTINUED)	219
TABLE 48 (CONTINUED)	220
TABLE 49 PATENT SURVEY, 2006	220
TABLE 49 (CONTINUED)	221
TABLE 49 (CONTINUED)	222
TABLE 49 (CONTINUED)	223

<i>TABLE 50 PATENT SURVEY, 2007</i>	224
<i>TABLE 50 (CONTINUED)</i>	225
<i>TABLE 50 (CONTINUED)</i>	226
<i>TABLE 51 PATENT SURVEY, 2008</i>	226
<i>TABLE 51 (CONTINUED)</i>	227
<i>TABLE 52 PATENT SURVEY 2009</i>	228
<i>TABLE 52 (CONTINUED)</i>	229
<i>TABLE 52 (CONTINUED)</i>	230
<i>TABLE 52 (CONTINUED)</i>	231
<i>TABLE 53 PATENT SURVEY, 2010</i>	231
<i>TABLE 53 (CONTINUED)</i>	232
<i>TABLE 53 (CONTINUED)</i>	233