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US Membrane Separation Technologies Market

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Report Summary

Demand to grow more than 8% annually through 2012

US demand for membrane materials is expected to increase 8.2 percent per year to \$4.3 billion in 2012. Advances will be driven by the ongoing penetration of membranes into key markets such as water and wastewater treatment, and food and beverage processing, largely at the expense of conventional filtration equipment that cannot equal the performance attributes of membranes. This trend has been prompted by the need to comply with strict regulations pertaining to water and wastewater quality, as well as an increasing interest in process fluids with higher purity levels. Additional factors driving gains include the ability of membranes to reduce water use and waste disposal expenditures, and to improve water and material recovery and reuse. Demand for nonpolymeric materials, including ceramic, metal and composite types, is expected to record double-digit growth through 2012, due to their better performance in extreme temperatures and greater pH ranges. However, polymeric membrane materials will continue to dominate the market because they have lower initial costs and greater product flexibility than nonpolymeric materials. Cellulosic membranes, the least expensive materials, accounted for the largest share of polymeric membranes -- nearly 60 percent in value terms -- in 2007, although that share is slowly declining.

Microfiltration to remain largest application

Among major applications, gains are expected to be strongest for pervaporation membranes, albeit from a small base, because of their use in high-growth specialty markets. Advances are also projected to be strong for ultrafiltration and reverse osmosis membranes, both of which function in a variety of markets. Microfiltration membranes will continue to account for the largest share of total demand, but represent a better established and more mature segment of the market. Other types of separation technologies that incorporate membranes include nanofiltration, dialysis, electro dialysis and gas separation.

Pharmaceutical, medical markets to increase fastest

Key markets for membranes include water and wastewater treatment, food and beverage processing, pharmaceuticals and medical products, chemical production, industrial gas production and others. The best opportunities for growth will emerge in the pharmaceutical and medical markets, and smaller markets such as environmental applications and fuel cells. Fuel cells, although currently negligible in market value terms, are expected to emerge as a significant outlet for membranes in the next 10 to 20 years. The water and wastewater treatment market continued to be the largest for membranes, representing 51 percent of sales in 2007.

Study coverage

It presents historical demand data (1997, 2002, 2007) plus forecasts for 2012 and 2017 by type, application and market. The study also considers market environment factors, evaluates company market share and profiles 39 competitors in the US industry.

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