

Desalination in 2008

Global Market Snapshot

Top 10 desal countries

1) Saudi Arabia	10,759,693 m ³ /d	17%
2) UAE	8,428,456 m ³ /d	13%
3) USA	8,133,415 m ³ /d	13%
4) Spain	5,249,536 m ³ /d	8%
5) Kuwait	2,876,625 m ³ /d	5%
6) Algeria	2,675,958 m ³ /d	4%
7) China	2,259,741 m ³ /d	4%
8) Qatar	1,712,886 m ³ /d	3%
9) Japan	1,493,158 m ³ /d	2%
10) Australia	1,184,812 m ³ /d	2%

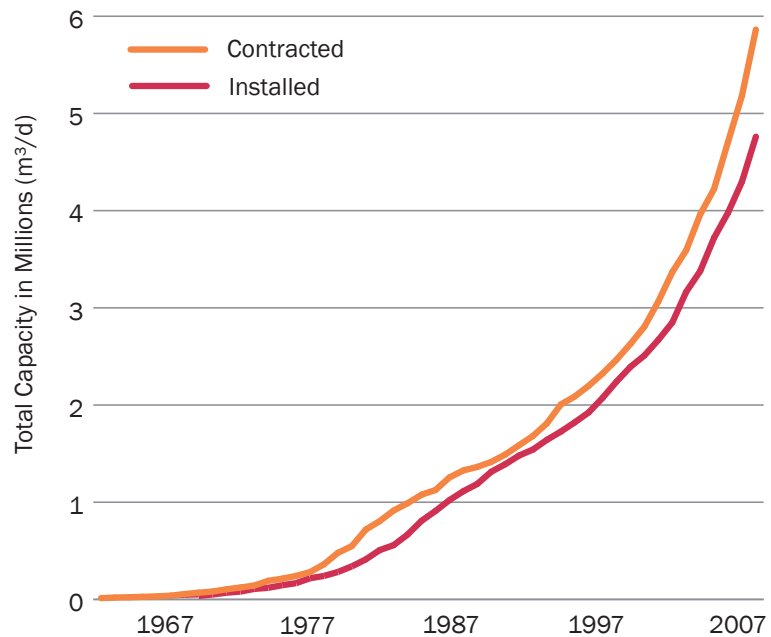
Source: GWI DesalData/IDA

+17.0%

The compound annual growth rate of new contracted capacity since 1990

There was a 43.3% increase in the amount of new capacity contracted in 2007 compared to 2006.

Cumulative desalination capacity growth



Source: GWI DesalData/IDA

Desal definitions

m³/d Cubic meters per day. 1 cubic meter = 264.172 052 36 gallon [US, liquid]

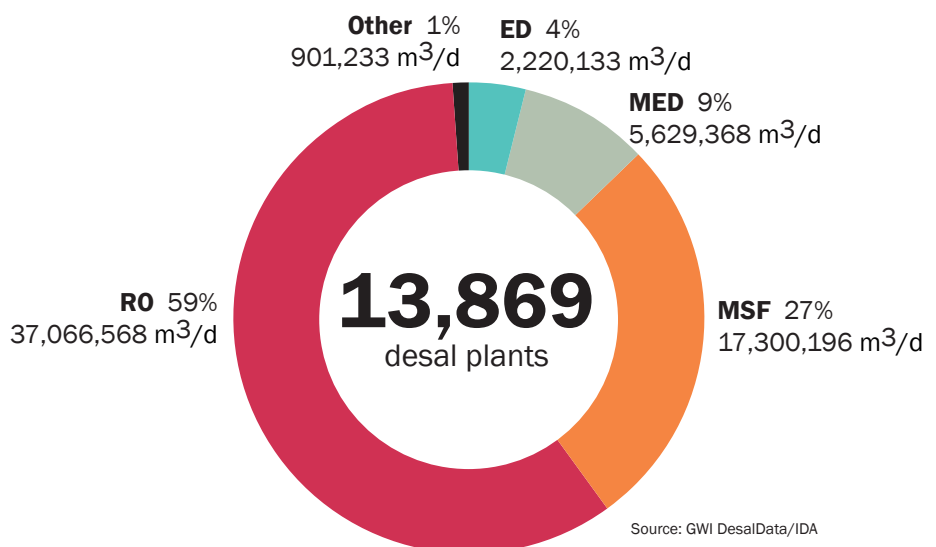
RO Reverse osmosis. A method of separating water from dissolved salts by passing feed-water through a semi-permeable membrane at a pressure greater than the osmotic pressure caused by the dissolved salts.

ED Electrodialysis. The separation of a solution's ionic components through the use of semi-permeable, ion-selective membranes operating in a DC electric field.

MED Multiple effect distillation. A thin film evaporation process where the vapor formed in a chamber, or effect, condenses in the next, providing a heat source for further evaporation.

MSF Multistage flash evaporation. A desalination process where a stream of brine flows through the bottom of chambers, or stages, each operating at a successively lower pressure, and a proportion of it flashes into steam and is then condensed.

Contracted desal plants by technology



Source: GWI DesalData/IDA

+90%

The increase in contracted MED capacity since 2004
Nearly 2.7 million m³/d of MED capacity was contracted between the end of 2004 and mid-2008.

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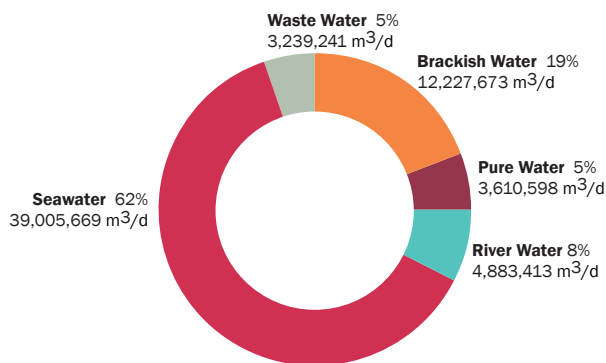
Annual capacity

	Annual new contracted capacity	Annual change	Cumulative contracted capacity	Annual change	Annual new on-line capacity	Annual change	Cumulative installed capacity	Annual change
1990	959,881	27.3%	15,857,805	6.4%	897,409	15.6%	14,800,583	
1991	964,848	0.5%	16,822,653	6.1%	619,253	-31.0%	15,419,836	4.2%
1992	1,291,561	33.9%	18,114,214	7.7%	998,845	61.3%	16,418,681	6.5%
1993	1,941,556	50.3%	20,055,770	10.7%	847,382	-15.2%	17,266,063	5.2%
1994	827,988	-57.4%	20,883,758	4.1%	951,498	12.3%	18,217,561	5.5%
1995	1,094,048	32.1%	21,977,806	5.2%	1,022,977	7.5%	19,240,538	5.6%
1996	1,274,092	16.5%	23,251,897	5.8%	1,501,645	46.8%	20,742,183	7.8%
1997	1,417,092	11.2%	24,668,989	6.1%	1,672,432	11.4%	22,414,614	8.1%
1998	1,626,497	14.8%	26,295,486	6.6%	1,516,423	-9.3%	23,931,037	6.8%
1999	1,768,234	8.7%	28,063,720	6.7%	1,168,281	-23.0%	25,099,318	4.9%
2000	2,594,238	46.7%	30,657,957	9.2%	1,604,119	37.3%	26,703,437	6.4%
2001	3,014,398	16.2%	33,672,355	9.8%	1,785,030	11.3%	28,488,466	6.7%
2002	2,254,373	-25.2%	35,926,728	6.7%	3,157,919	76.9%	31,646,385	11.1%
2003	3,674,042	63.0%	39,600,770	10.2%	2,127,657	-32.6%	33,774,042	6.7%
2004	2,757,629	-24.9%	42,358,399	7.0%	3,534,628	66.1%	37,308,670	10.5%
2005	4,834,186	75.3%	47,069,318	11.4%	2,580,943	-27.0%	39,786,362	6.9%
2006	4,749,952	-1.7%	51,819,270	11.1%	3,191,916	23.7%	42,978,277	8.0%
2007	6,808,159	43.3%	58,627,430	13.0%	4,627,817	47.5%	47,606,094	11.2%
2008*	4,122,791		62,750,220		4,727,856		52,333,950	
1997-2007 CAGR		17.0%		9.1%		10.7%		7.9%

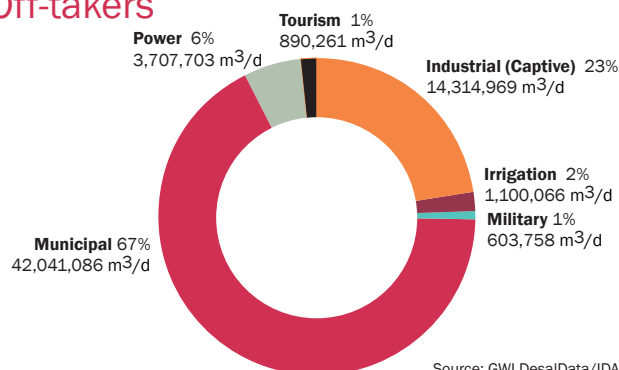
* six months only

Source: GWI DesalData/IDA

Feedwater quality



Off-takers



Source: GWI DesalData/IDA

Top 20 desal plant suppliers since 2000

1	Veolia Environment	5,420,072m³/d
2	Fisia Italimpianti	3,025,344m³/d
3	Doosan	2,852,305m³/d
4	GE Water	2,471,987m³/d
5	Suez Environnement	1,528,710m³/d
6	Befesa Agua	1,387,624m³/d
7	ACS (Cobra/Tedagua/Drace)	1,312,347m³/d
8	Hyflux	1,121,508m³/d
9	Acciona Agua	1,111,516m³/d
10	IDE	1,001,730m³/d
11	Sadyt	832,800m³/d
12	Cadagua	730,724m³/d
13	Nomura Micro Science	495,712m³/d
14	aqualia	488,450m³/d
15	Kurita Water Industries	427,138m³/d
16	John Holland	405,000m³/d
17	Wabag	369,140m³/d
18	Wetico	337,496m³/d
19	ITT	311,639m³/d
20	Aqualyng	270,375m³/d

Source: GWI DesalData/IDA

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