

Water Technology Market Opportunities

European Energy Venture Fair
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www.o2env.com

www.bluetechtracker.com



Brave Blue World

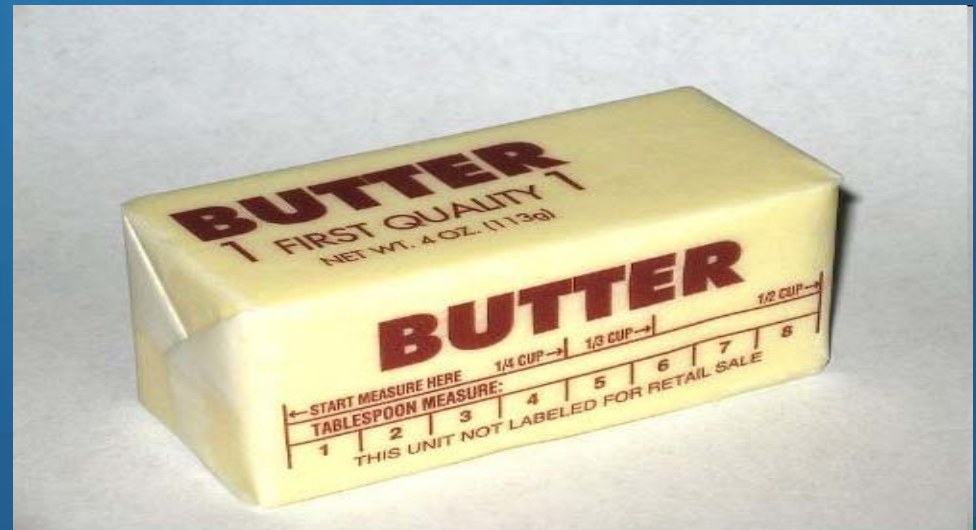
Intelligent Design or Evolution?



Water is a Local Issue



Re-thinking Water Systems Efficiency



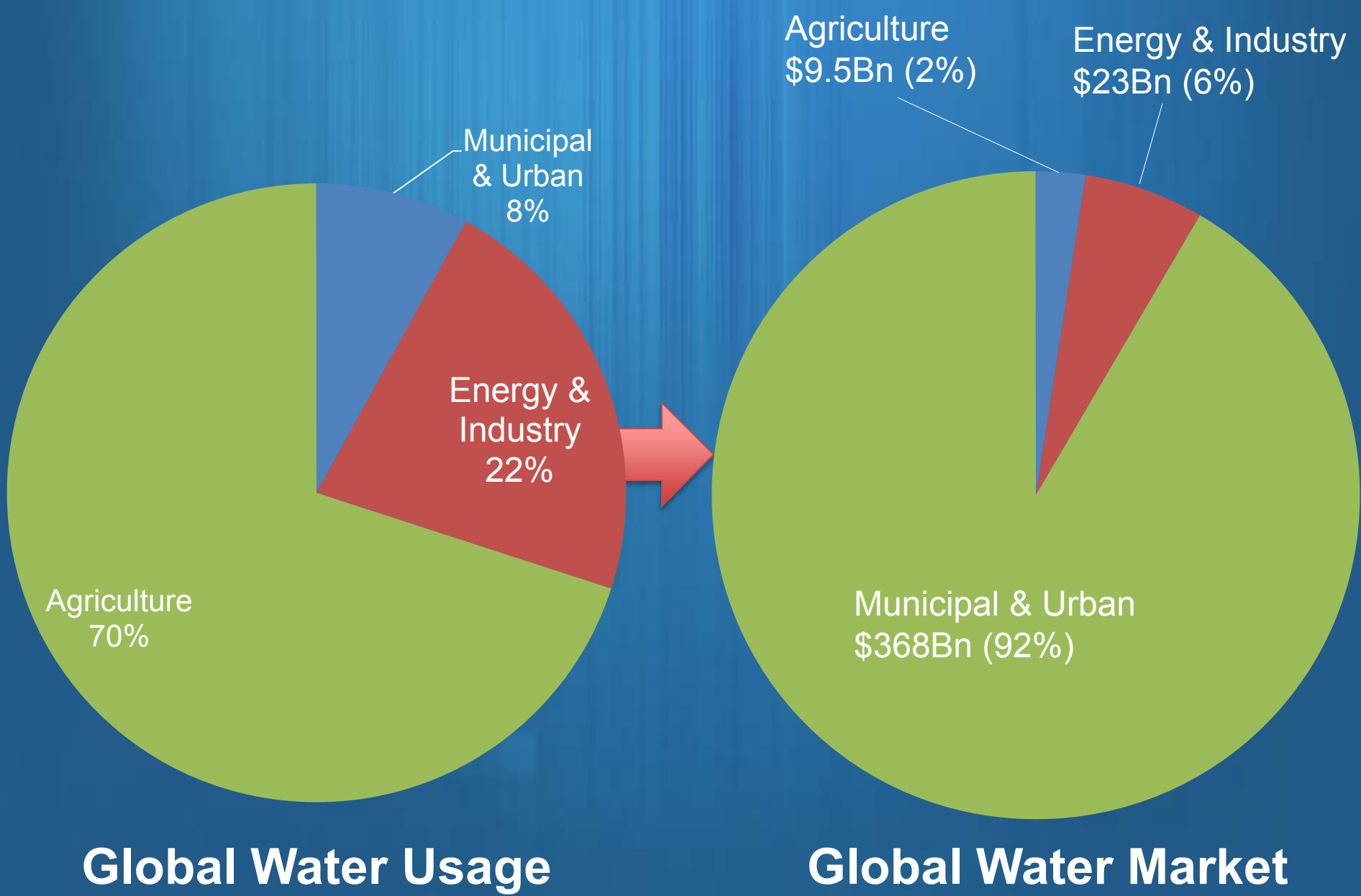
Providing water services... ...without water



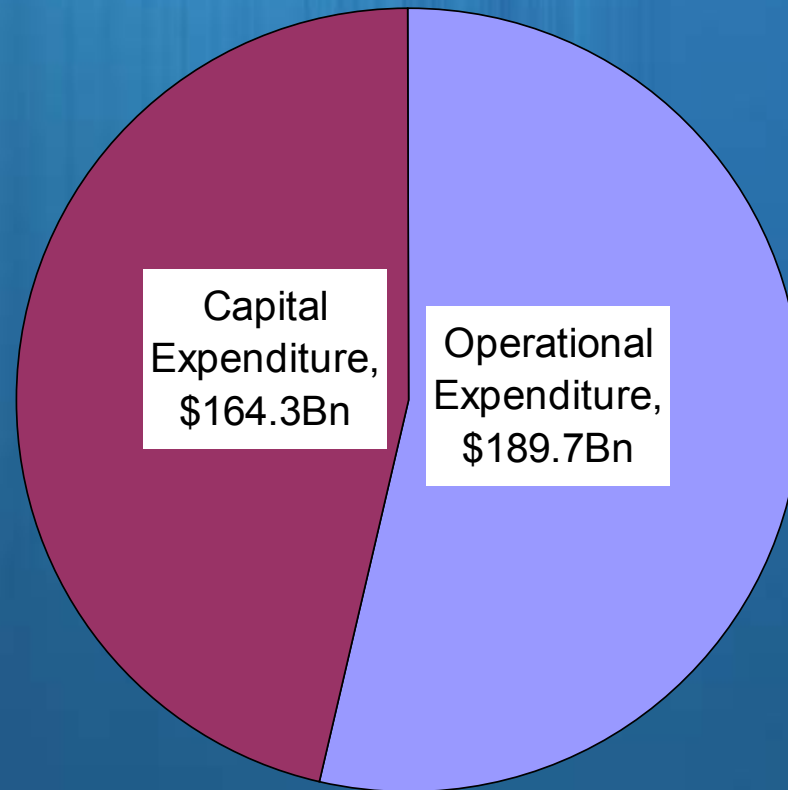
Global Water Use

- Agriculture: 70%
- Energy & Industry: 22%
- Municipal and Urban: 8%

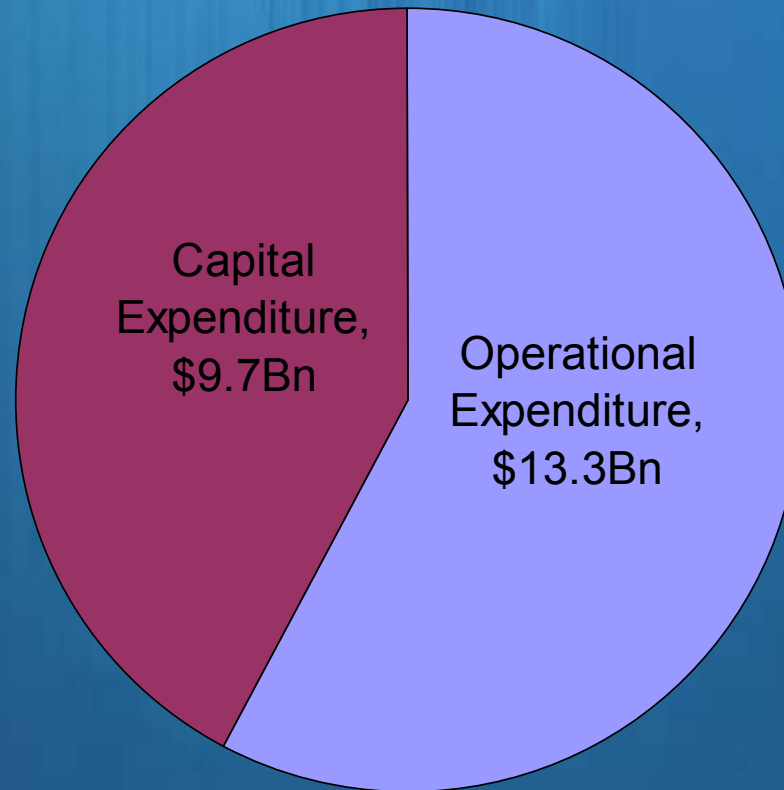




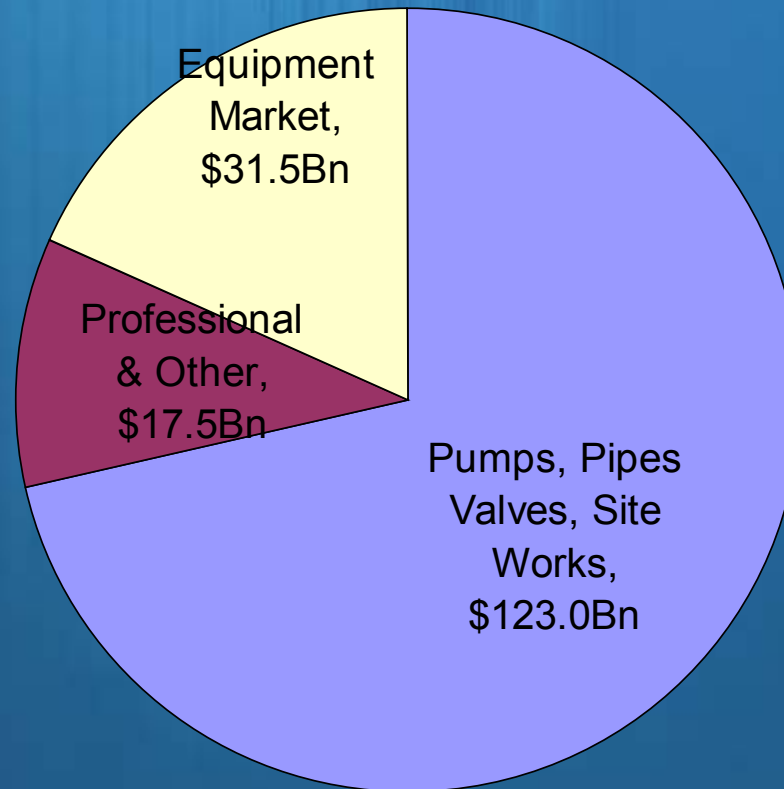
Global Water Utility Market: \$354Bn



Global Water Industrial Market: \$23Bn



Global Water Capital Expenditure: \$172Bn



What Technologies are we likely to see?

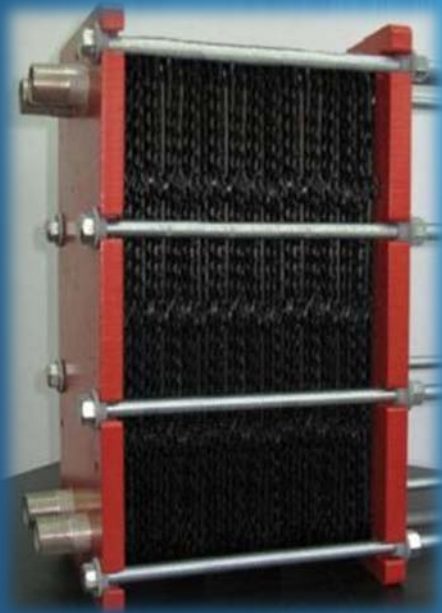
- Technologies that deal with water issues locally
- Technologies that use ‘butter knives’ instead of chainsaws
- Technologies which provide water services, without using potable water, or using less water

Areas and Technologies to Watch

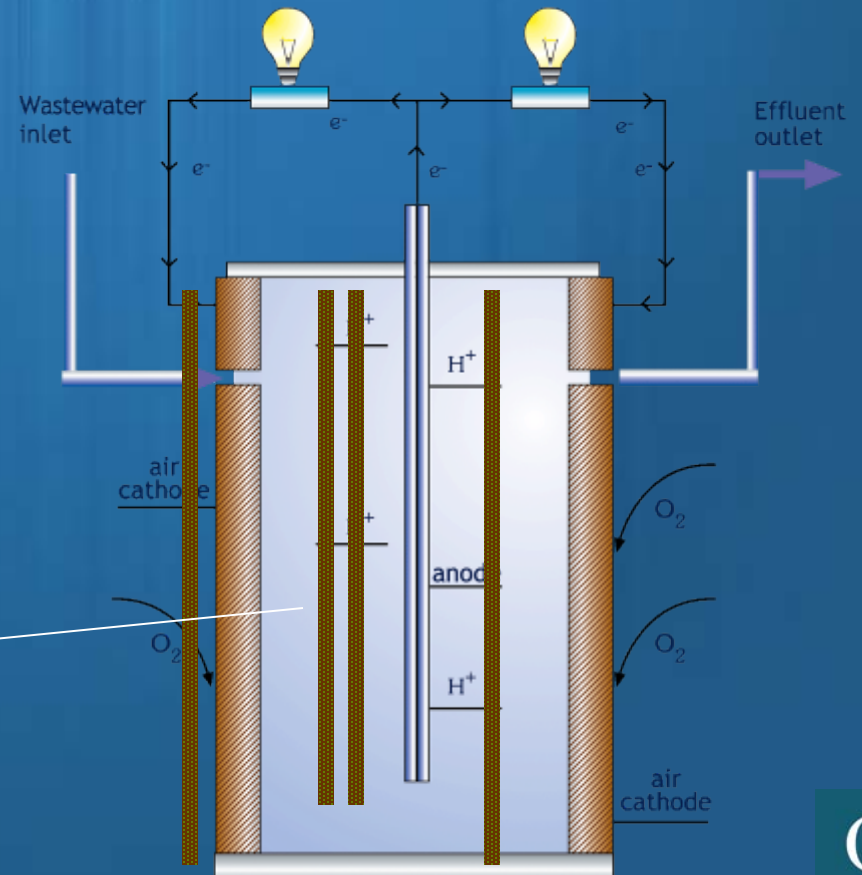
- Energy and Resource Recovery
 - SCFI
 - Emefcy
- Produced Water Treatment
 - Soane Energy
 - Drake Water Technology
- Decentralised Treatment and Re-use
 - M2 Renewables

The MEGAWATTER™ Technology

Electrogenic bacteria, while treating the wastewater at the anode, break-down the organic material into electrons and protons



Electrogenic Biofilm with conductive nano-wires

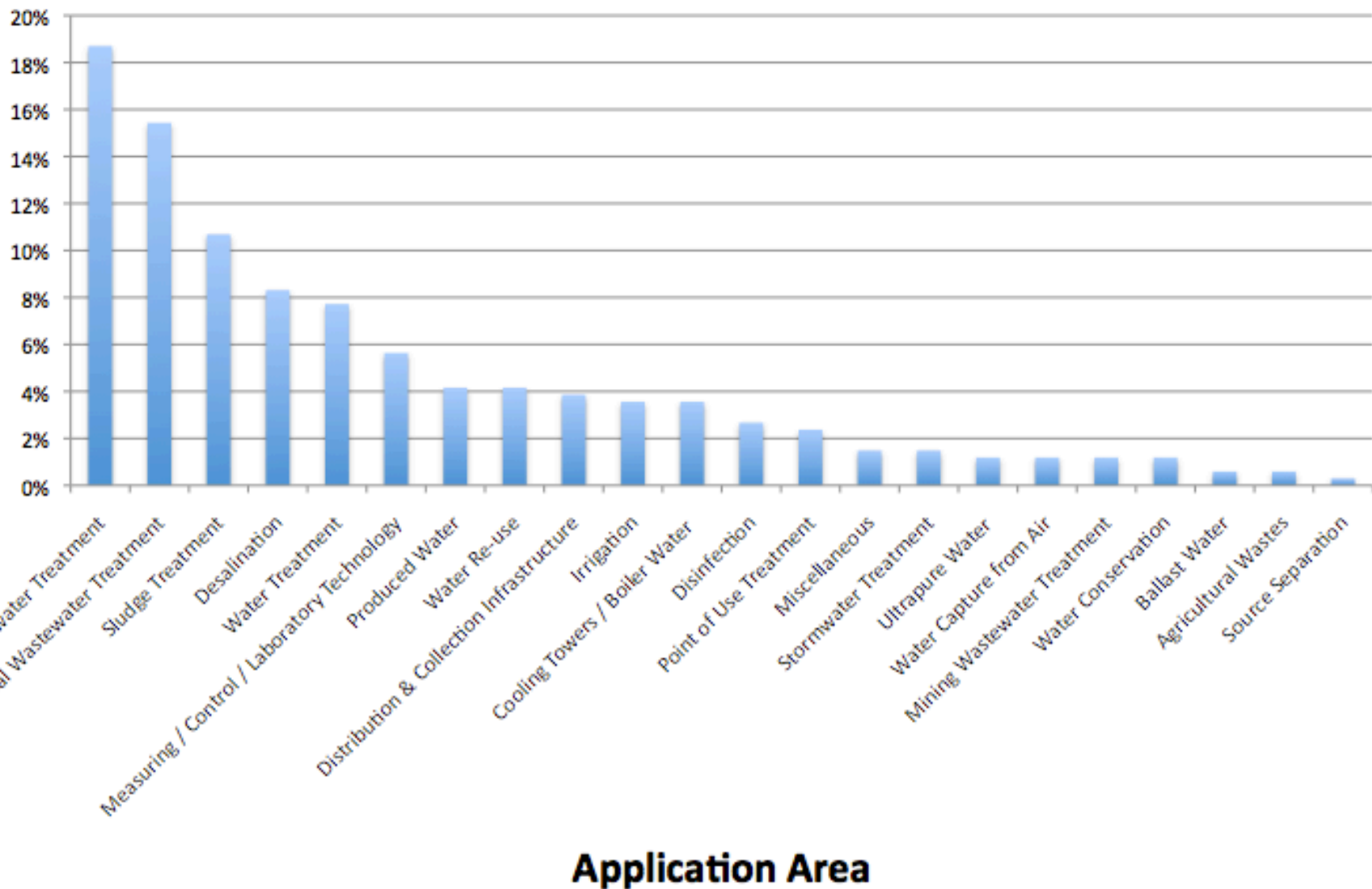


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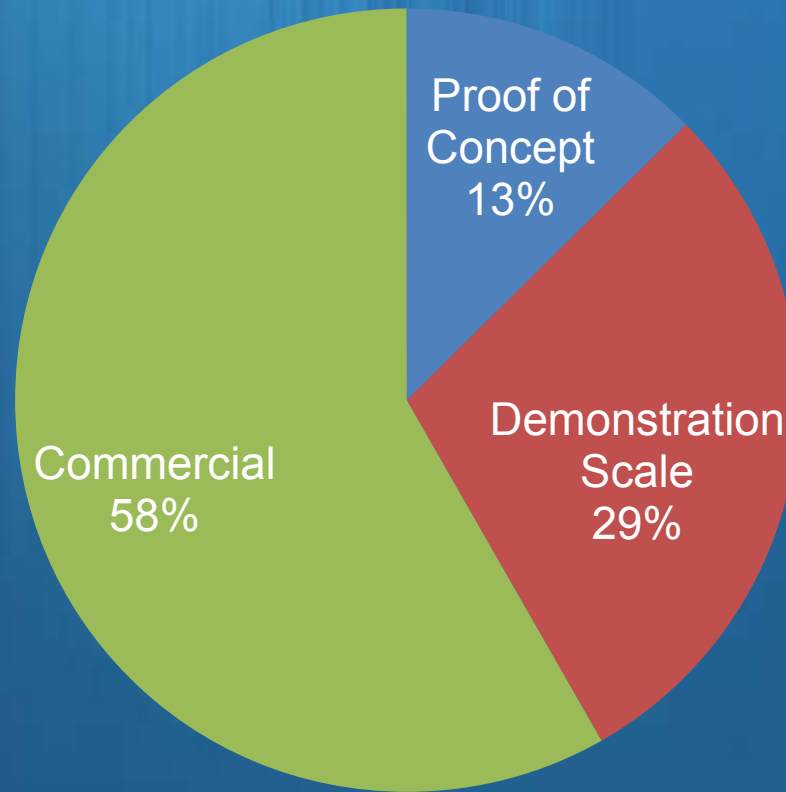
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BlueTech Tracker Innovative Companies: Application Area

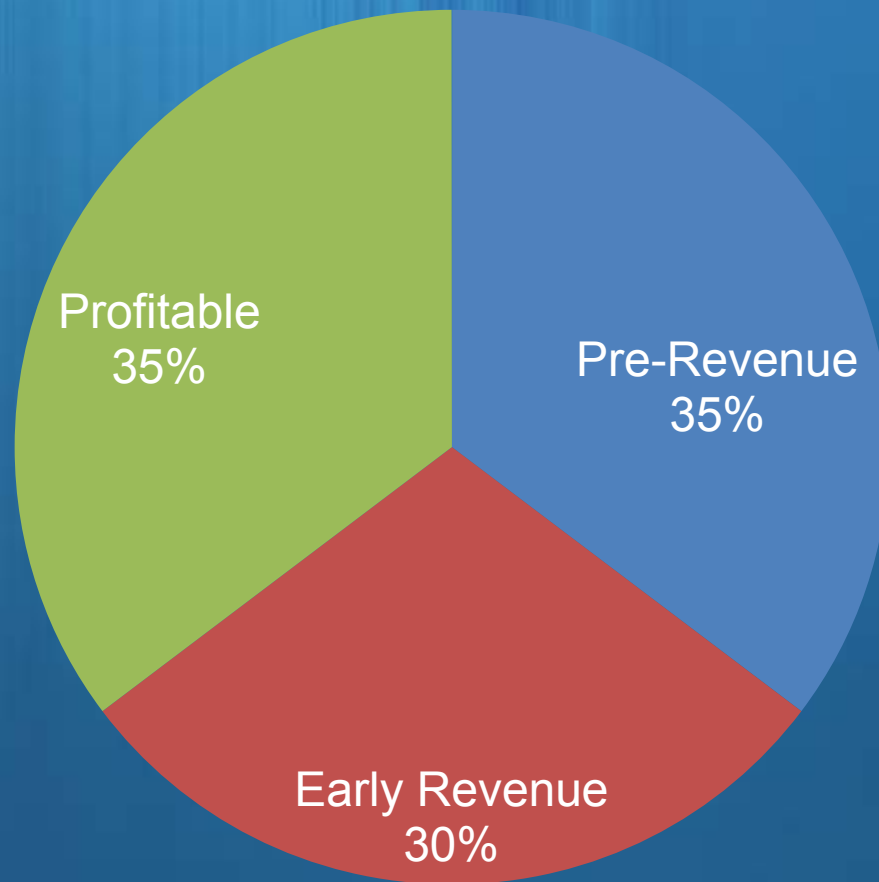
Percentage of Companies in the Tracker



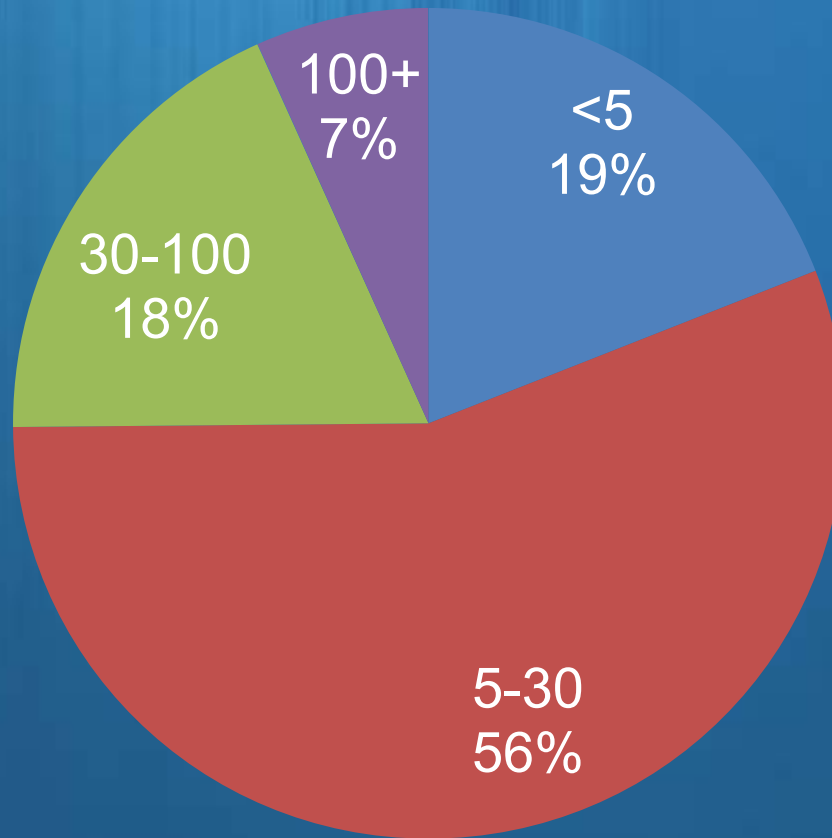
BlueTech Tracker Companies: Technology Development Stage



BlueTech Tracker Companies: Company Revenue Stage



BlueTech Tracker Companies: Number of Employees per Company



How is the water technology market likely to Change?

- Pressures are driving early adopters
- New technologies will then move to the ‘Early Majority’ section of the market
- Overall the rate of adoption of new solutions will accelerate

When there is Big Change,
there is Big Opportunity

Straws in the Wind

- Increase in Research:
 - *Up 30% each year between 2000 & 2009* (Elsevier)
- Increase in Patent Filings
 - Desalination Technology Patents in 2010 almost double those in 2005 (O2 Environmental)
- Investments and Acquisitions
 - 2009- record high, 50 deals, 60% early-stage (Cleantech)
- Water Centres for Excellence
 - Proliferating at an alarming rate
- Water Conferences!

BlueTech Tracker

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Real experts.
Real time.

Water Technology Market Intelligence

BlueTech Tracker provides intelligence on water technology innovation. We are focused on what is changing, how new approaches, new technologies, and new needs, are re-shaping the water technology market.

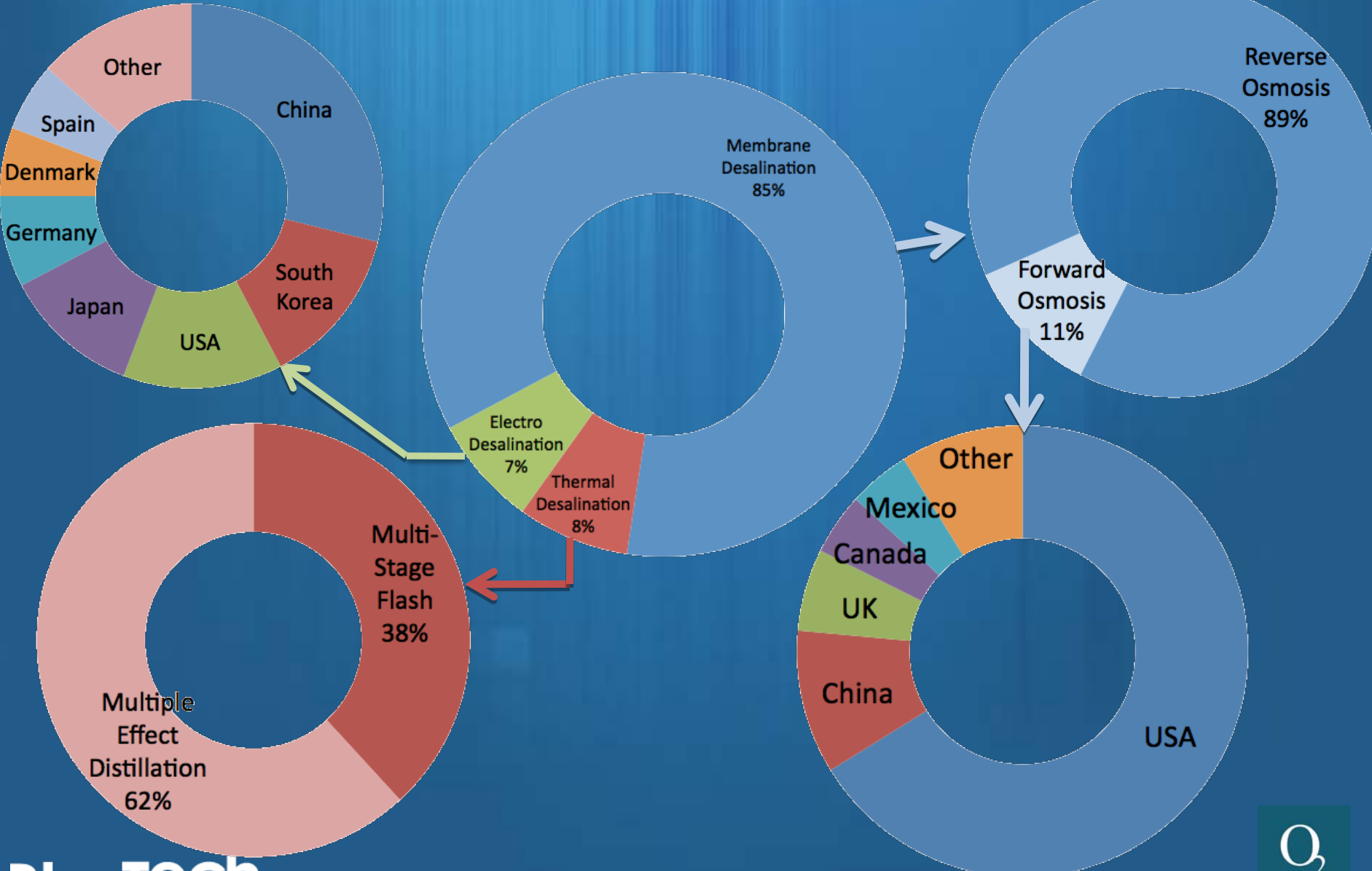


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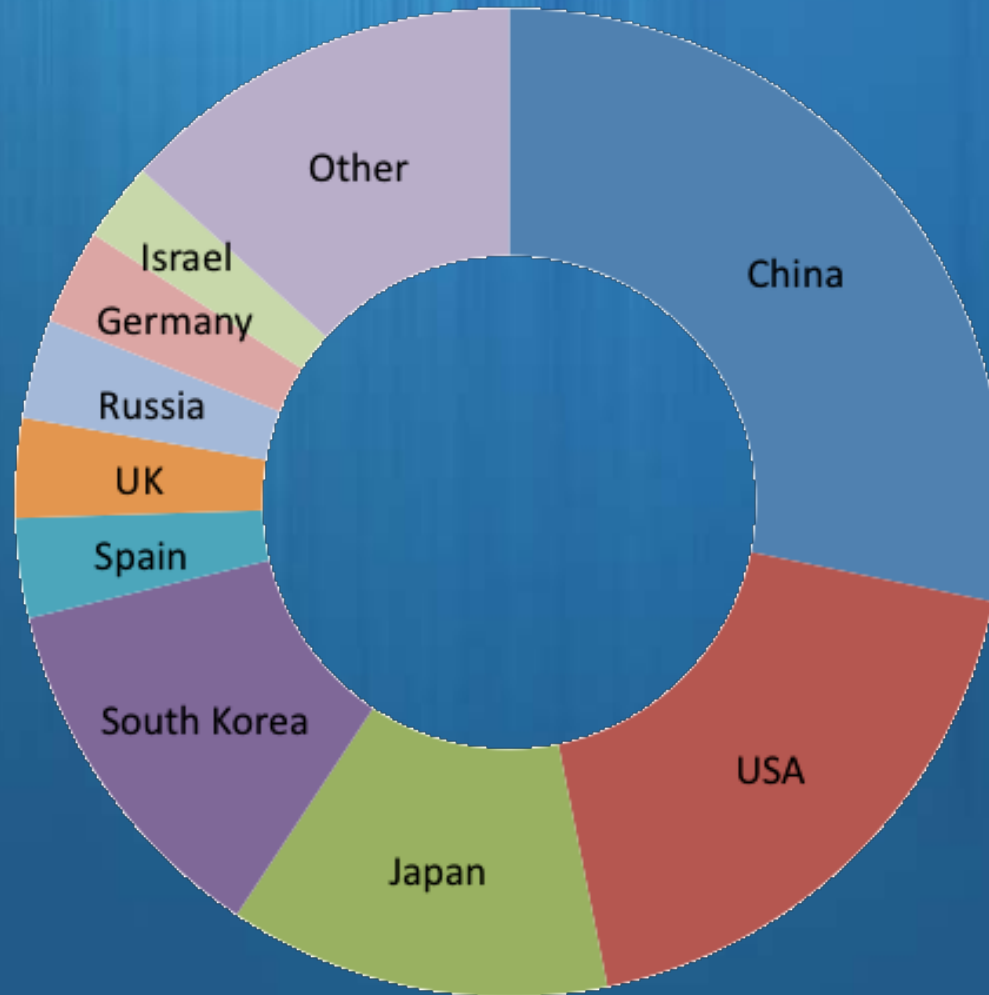
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Desalination Patent Breakdown



Desalination Patents (2005-2010) – by Assignee's Country



Nutrient Recovery Technologies

- Ostara
- DHV – Crystallactor
- Phosnix
- Pho-Strip
- REM-NUT
- P-RoC – Phosphorus Recovery
- Kemira- Kemicond & Krepro
- ThermoEnergy – Ammonia Recovery Process

