PUBLICATIONS GUIDE 2016

MARKET-LEADING ANALYSIS OF THE INTERNATIONAL WATER INDUSTRY

GLOBAL WATER INTELLIGENCE MAGAZINE WATER DESALINATION REPORT DESALDATA.COM GLOBAL WATER MARKET 2017 INDUSTRIAL WATER SERVICES & CHEMICALS INDIA WATER MARKETS CHINA INDUSTRIAL WATER MARKETS DESALINATION MARKETS 2016 INDUSTRIAL WATER TECHNOLOGY MARKETS PRIVATE SECTOR PARTICIPATION IN WATER WATER FOR OFFSHORE OIL AND GAS



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GLOBAL WATER •INTELLIGENCE MAGAZINE

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Global Water Intelligence has established itself as the unchallenged leader in highvalue business information for the water industry.

Offering monthly news and a repository of critical water data and analysis of market developments, water companies and water finance, this publication offers market intelligence that will help you shape the direction of your company's future.

Top executives and leaders from the largest private water corporations, savvy tech start-ups, public utilities, ministries and associations as well as consultants, financiers and financial institutions read GWI Magazine every month.

NEW BUSINESS DEVELOPMENT OPPORTUNITIES AND SALES LEADS:

Identify your sales leads more effectively with our exclusive project tracking service. We track more than 1,000 live desalination, water reuse, water and wastewater treatment projects and utility concessions at the pre-award stage. Any of those projects may be a potential sale for your company, and our updates will keep you a step ahead of your competitors. Many companies read *GWI* for this service alone – can you afford to be left behind?

INTERNATIONAL COVERAGE WITH LOCAL EXPERTISE:

Written by a team of experts with years of experience in the water, finance and publishing markets, they have unrivalled access to the key players at the highest level of the industry from both the public and the private sector. This means that we are the first to know about major water industry news and when new projects are announced – and we bring that news to you first.

With over 10,000 of the most influential people in water reading this magazine and following our project trackers, you don't want to miss out on the stories that shape their competitive strategies and the project leads that supply them with their most lucrative sales opportunities.



UPGRADED ONLINE PROJECT TRACKER DATABASE

We track each water project from conception stage right through to completion, giving you the critical information you need to take advantage of water investment opportunities and to get involved before the projects even go to tender.

Desal Project Trackers: Keep up to date with around 300 desalination construction projects relating to desalination treatment facilities with planned initial capacities of 10,000m3/d and above, and which use treatment technology equivalent to reverse osmosis or above. We cover these from conceptual phase right through to financial close. We tell you the size of the plant, the client, the relevant contact name, the cost, the project structure and status.

Reuse Project Trackers: Our popular project tracker provides around 200 reuse construction projects relating to wastewater reuse facilities with planned initial capacities of 10,000m3/d or above, which have a level of treatment equivalent to tertiary or above, and which also have a defined element of beneficial reuse as regards the treated effluent.

Water and Wastewater Treatment Plant Project Trackers: We currently track around 400 water and wastewater construction projects involving a treatment element of 10,000m3/d or above, which also incorporate either an operating period for the private sector of five years or more, and/or private finance.

Utility Project Trackers: This category includes lease/concession-type contracts involving water and/or wastewater treatment assets, as well as pure O&M contracts with a minimum initial operating period of five years, and which relate to water and/or wastewater treatment assets with a minimum capacity of 1MGD (3,785m3/d). Also included here are pending sales of water and wastewater systems by the public sector to the private sector (i.e. full-scale privatisations).

ANNUAL SUBSCRIPTION BENEFITS:

- Hard copy of the magazine every month, plus the PDF version
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"GWI is truly one of the world's leading water specific publications. We find tremendous value in their unbiased articles, independent analysis and market updates. Furthermore, their articles are well written by experts who understand the global water industry, the terminology and the market challenges.

Ralph Exton, CMO for GE Water & Process Technologies

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WATER DESALINATION °REPORT

WEEKLY E-NEWSLETTER

WEEKLY NEWS FOR THE INTERNATIONAL DESALINATION COMMUNITY

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WATER DESALINATION REPORT

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Water Desalination Report (WDR) is the weekly news bulletin for the international desalination and advanced water treatment industry. We recognise that time is money and so does Tom Pankratz, industry expert and WDR editor. He gives you an exclusive, inside view of the desalination industry - focusing on the news and intelligence that will have a direct impact on your business. The newsletter is 4 pages every week, condensing vital industry information into a format that is quick and easy to absorb.

Receive updates on current and future desalination plants, with insight into the commercial developments behind the scenes. Get the scoop on the new and emerging technologies that could revolutionise the market. Keep an eye on your competitors, or use our `desal grapevine' to look for job opportunities and see where people are moving to. WDR is the voice of the desalination community.

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- Free IDA Yearbook 2016 2017: Worth £305/\$550! Includes the reference directory, new plant listings and the annual market profile

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DesalData.com is an online database containing over 18,500 desalination plants and projects. It provides a network of related links between companies, projects, analysis and the latest news, making it the ultimate business tool for desalination professionals. You can track the progress of a project, monitor your competitors, or make predictions based on market conditions.

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GLOBAL WATER MARKET

- 12 months access to information and data about the worldwide desalination market
- Weekly desal tracker updates, regular enhancements and support as required
- Annual market forecast webinars with industry expert and *DesalData* editor Francisco Virgili

Annual subscription: **£2,200/\$4,000**

"DesalData is a very useful tool for ACCIONA Agua, and helps us in our day to day business planning. It helps our commercial people to make their decisions and even to know some information that we don't have about our own company."

Elena Reyna Monasterio, Marketing and Communication Director, ACCIONA Agua

"DesalData is the one source to go to for reliable and updated information about what is happening in the desalination industry globally. We have actively used the service since it was launched and find it more useful than ever."

Christian Wee, Sales Director, Aqualyng

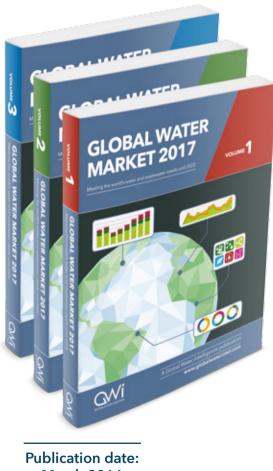
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GLOBAL WATER MARKET °2017

HARD COPY REPORT WITH PDF

MEETING THE WORLD'S WATER AND WASTEWATER NEEDS UNTIL 2020

Price: £3,750/\$6,250



March 2016

YOUR STRATEGIC INFORMATION **RESOURCE FOR SUCCESS IN THE** WATER BUSINESS TO 2020

Global Water Market 2017 goes beyond the geographic focus of previous editions of GWI's bestselling information resource to create a detailed matrix of market analysis by technology, by end user, by business model and by product type. Furthermore, the report maps out the participants in each market space, to create the ultimate business development tool.

This report covers every angle of the global water sector, including coverage of major markets, key companies as well as the popular country profiles. Whether you are looking to build or buy your way into a new market, Global Water Market 2017 answers all of your most important questions:

- How big is the market?
- How fast is it growing?
- What do customers need?
- What are the trends?
- Who are the competitors?
- What are they doing?



HOW TO USE THIS REPORT

This report is an essential handbook for any company that needs a complete view of the global water sector, helping you plan your next move:

- Budgeting: what can you expect from your business next year? Global Water Markets 2017 provides informed third party validation of how your core markets are developing. It is an essential resource for any executive involved in setting targets, allocating resources and planning investment
- **Building:** what are the best markets to target for growth? *Global Water Market 2017* is like a travel guide for water industry executives looking to move into new markets. It tells you what it is like, how it works and who you will meet there. Growing without it can be painful or dangerous
- **Buying:** what is the case for an acquisition? The 2017 edition of GWI's Global Water Markets report introduces detailed information on the market position of more than 500 businesses in the water sector. That makes it a shopping list of acquisitive companies and an essential due diligence resource

WHO SHOULD READ THIS REPORT

With three bestselling editions so far, The Global Water Market report is the most comprehensive water report ever published. It focuses on water and wastewater treatment and distribution for domestic and industrial users and is used by international companies to formulate business plans, reach new customers and enter new markets. Global Water Market 2017 is an essential handbook for any business working in the sector. Here is some insight into how your business can make use of the report:

- **Investors and financiers** Global Water Market 2017 will provide you will with all the information you need to do your preliminary market research in a fraction of the time and all the quantitative data and forecasting you need to identify the best investment opportunities
- Equipment suppliers, engineers and consultants This report analyses supply chains and procurement methods in the water sector, identifying the biggest opportunities in each market and enabling you to find the most effective ways in which to enter or expand your involvement in different markets
- **Multinational water companies** this is a critical budgeting and strategy tool for executives working within the water sector. It will help you understand how your core markets are developing, which markets to target for growth, who your competitors are and how those markets work in practise. This is the only report where you can find comprehensive data and forecasts for the municipal and industrial sectors in one place
- **Policy makers, water utilities and aid agencies** find detailed examples on organisational structure, financial mechanisms and operational management

KEY FEATURES

- 1. Global and country-bycountry forecasts from 2014 to 2020 - Forecasts of capital and operating expenditure for the utility and industrial sectors, broken down by application, technology and equipment to help understand the size of the market for your solution or service
- 2. 32 In-depth country chapters -Featuring analysis of the regional opportunities, explanation of market dynamics, current and future projects, major market participants and a brand new industrial water section, giving you the tools you need to identify the best markets to target for growth and to plan your strategy for entering, or expanding your presence in, those regions
- **3. 68 Country trend reports** includes historical data and spending forecasts in a visually accessible format to help you assess the direction of your target market
- 4. Companies & Markets In addition to the geographical coverage, Global Water Market 2017 now includes expansive data and analysis of key global markets including engineering and contracting, water and wastewater treatment, networks and infrastructure equipment and industrial water, so you have a complete picture of the current and emerging opportunities in each sector. All of the major key players in each market are featured, giving you all the information you need to establish the size and shape of the market

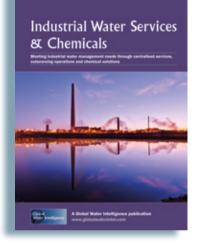
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INDUSTRIAL WATER SERVICES

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MANAGING WATER NEEDS THROUGH OUTSOURCED OPERATIONS

Price: **£2,200/\$4,000**



Publication date: October 2015 Stricter regulations on discharge and wastewater treatment are making it increasingly challenging for end-users to internally manage their water supplies. Industrial water users are looking for full water management services to offer cost-saving solutions that maximise water and energy efficiency, allowing them to focus on their core production business.

Industrial Water Services & Chemicals will investigate the unique water challenges in each industry and how these challenges are creating opportunities for full solution providers, chemical suppliers and oilfield service companies. This report is a musthave guide for understanding how to target the industries with the greatest demand for your solutions.

OPPORTUNITIES

- Demand for wastewater treatment and recycling expertise: The drive towards water reuse and recycling in industrial applications is placing higher importance on wastewater streams. As it is more difficult to treat to a level suitable for reuse, it requires greater chemical usage as well as more advanced expertise, driving the demand for third-party involvement
- Water Management Prospects: As industrial production continues to grow in emerging countries, the rise in associated water requirements often expand beyond the end-users' capacity to deal with water systems internally. Therefore the need for water management in these regions provides real prospects for water service companies and chemical providers who are active either on a global or even a local-scale
- **Temporary water treatment systems, outsourcing and chemical treatment:** Power generation, refining and petrochemicals are the largest industrial markets driving the demand for mobile solutions, outsourcing contracts and chemical treatment. Therefore, there are significant opportunities for many different types of companies to gain involvement in these sectors
- **Full Solutions Providers:** Industrial end-users currently work with several third-parties to meet their water management needs and this can often cause logistical and contractual difficulties for the client. There is therefore a growing demand for companies which can provide full water solutions that cover water treatment, chemicals and management services
- Industrial Wastewater Services: Opportunities in industrial wastewater also relate to the end-users' typical view that it is an inconvenient waste product. This stream is not usually a priority for end-users because it does not directly impact their production operations, therefore they are keener to outsource this externally and pass control to third-parties. This report will reveal why there are good opportunities for services companies that can extract value from wastewater



INDIA WATER MARKETS

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OPPORTUNITIES FOR WASTEWATER TREATMENT IN A TOUGHER REGULATORY CLIMATE

A crackdown on water pollution is in motion. New regulations and tougher action on offenders is driving a multi-billion dollar wastewater market set for considerable growth in the coming years. Sanmit Ahuja, CEO of Oval Observer Foundation, told GWI Magazine (June, 2015) that the private sector needs to get involved in the cleanup of the Ganga to meet the capital requirements of the plan and that a market for treated water needs to be created.

The new report, *India Water Markets: Opportunities for wastewater treatment in a tougher regulatory climate* is your guide to the key developments driving investment in the Indian water market. In-depth forecasts, procurement model and supply chain analysis will enable you to identify the best opportunities for your business and to develop a strong strategy for market entry.

OPPORTUNITIES:

- 1. New wastewater treatment plants and plant upgrades: The overall cost of cleaning the Ganga has been estimated at \$100billion. For this purpose, many additional wastewater treatment plants will be required, as well as the need for upgrading existing plants and more advanced wastewater treatment in order to comply with stricter regulations
- 2. New plants driving opportunities for new technologies: More and more plants in India are being procured with O&M periods attached. The increasing specialisation of water treatment systems creates opportunities for water companies with established international expertise and a greater chance for new technologies to be implemented
- **3. Urban water supply and sanitation:** The government is continuing to commit considerable spend for urban water supply and sanitation through such programmes as the Atal Mission for Rejuvenation and Urban Transformation (AMRUT) and the Smart Cities Mission
- 4. Wider adoption of ZLD and advanced technologies: Growing industrial water reuse and the drive towards ZLD means advanced technologies are sought to increase water recovery rates and reduce discharge volumes. Wider adoption of these technologies drives the need for more effective secondary and tertiary treatment to optimise these processes
- **5. Private Sector Participation:** The estimated expenditure for water infrastructure required in India far surpasses the financial capacity of the Indian government, and therefore, private finance to meet these demands is being actively encouraged. There are prospects for BOTs in the longer term and an increased involvement of the private sector in the water market both in financing and operation

Price: **£2,200/\$4,000**

India Water Markets



Publication date: August 2015

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CHINA INDUSTRIAL •WATER MARKETS

OPPORTUNITIES AND PARTNERSHIPS IN THE NEW FOCUS ON INDUSTRIAL WASTEWATER TREATMENT

Price: **£2,200/\$4,000**

China Industrial Water Markets



Publication date: July 2015 The new Chinese government has made a commitment to get tough on industrial polluters, with the publication of its Water Pollution Action Plan in April. While official data claims that 70% of China's industrial wastewater is treated before discharge, experts consider 30% to be a far more realistic number. This plan could potentially lead to direct investments of over \$230 billion. In addition to increased investment, there will be double digit growth in some industries, making the Chinese industrial water sector a very buoyant market for international players. The broadening appeal of the environmental industry and the sheer scale of investment required to bring plants up to the regulatory standards has raised the profile of the water industry in this market. International companies need to be ready to take advantage of the window of opportunity to enter the Chinese industrial water sector.

MARKET DRIVERS

China Industrial Water Markets: Opportunities and partnerships in the new focus on industrial wastewater treatment will provide analysis of the key developments driving change and investment in the market. We explore the following drivers, so you can assess which of your solutions can help your potential clients to meet their water challenges:

- More Stringent Environmental Regulations We analyse which new policies and legislation will have the biggest impact on industrial water users in terms of the water usage and wastewater discharge. Find out what standards industrial clients need to meet and understand how this new legislation will drive investment in the various technologies and services offered by foreign companies
- Water Scarcity Many of the country's most industrious regions are located in water scarce areas. We identify the industries facing the greatest water challenges and the opportunities for water reuse to meet these challenges – so you can identify which industries will benefit most from your solutions
- **Industrial Growth** There are some industries that are also experiencing growth on top of the need to meet new regulations. We provide you with forecast data so you can pinpoint which industries should be targeted in your strategy
- **The Environmental Industry** This report analyses why industrial water users in China are now recognising that environmental protection could be an investment opportunity and how the new favourable policies will encourage businesses in China to work with international companies



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DESALINATION MARKETS °2016

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GLOBAL PERSPECTIVE AND OPPORTUNITIES FOR GROWTH

Price: **£2,500 / \$4,550**

GWI's Desalination Markets report has been the industry handbook for businesses working within the desalination industry since 2007. Desalination Markets 2016 comes at a time when it has never been more important for businesses to have a robust strategy for capitalising on emerging desalination activity.

This report is the essential guide to the growth hotspots, regional demand and the trends and challenges driving the need for desalination technologies – so your business can be the first to capitalise on developing prospects. It makes use of DesalData and GWI's extensive network of contributors to identify trends, making it the most comprehensive desalination report available.

Offering in-depth analysis of market dynamics alongside market size forecasts for capacity and investment, *Desalination Markets 2016* is the only report you need for planning your future activity in the industry and for capitalising on growth ahead of your competitors:

- **Global market forecasts** and market size data for contracted capacity, operating capacity, capital expenditure, operating expenditure from 2011 2020 broken down by country, region, technology, capex and opex categories
- **Country-by-country analysis** of 16 countries and 1 region covering municipal and industrial desalination, so you can identify the main trends driving opportunities and focus your business strategy
- **Company profiles** the report offers intelligence on the key companies working in the industry including an insight into their strategies and position in the market so you can effectively position your business alongside your partners and competitors
- In-depth analysis of core and emerging technologies, how they meet industry needs and what place they have in the market
- **Main market players** identify the main players including off-takers, EPC contractors, developers and technology suppliers
- Proposed plants and opportunities pinpoint future activity in the market and plan your strategy to capitalise on these opportunities ahead of your competitors



Publication date: April 2015

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INDUSTRIAL WATER •TECHNOLOGY MARKETS 2015

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MEETING INDUSTRIAL NEEDS IN PROCESS WATER TREATMENT AND WASTEWATER REUSE





Publication date: February 2015 Industrial water is the fastest growing sector of the global water market. Water technology companies will find major opportunities in this market if they can solve the problems of industrial water users with cost-effective, innovative solutions that improve efficiency. *Industrial Water Technology Markets* will identify where to pitch your technology in the market- helping your business benefit from the rapid growth in this sector.

Industrial Water Technology Markets shows you the technologies that end-users are looking for, their expectations from water technology suppliers, and how receptive to new technologies they are. We bring you exclusive intelligence on:

- The technology gaps in industrial water treatment find a niche for your technology in the challenges that different sectors are facing
- Where you can sell your technology this report will show you which regions and industries have the greatest interest in new technologies and a demand for your solution
- What end-users want technologies to deliver helping you to deliver a robust pitch to your prospective clients so that you can meet their water requirements

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PRIVATE SECTOR PARTICIPATION IN WATER

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OPPORTUNITIES FOR INVESTMENT AND EXPERTISE

The global water industry is on the verge of significant structural change. Driven by the need to improve performance and changes in the financing environment, the clear lines between the public and private sector will become increasingly blurred over the next decade. It will create a flood of opportunities for both investors and water service companies.

Private Sector Participation in Water documents these emerging opportunities both for those looking to deploy capital in the sector and those interested in new business models for selling their expertise into the sector. It lays out all the information you will need to develop a dynamically successful strategy to make the most of the new paradigm for water service delivery.

PROFILES

- 20 extended country profiles of the countries that will offer the biggest opportunities, plus an explanation of how each market works in practice
- Company profiles for the 10 most important players in the market and 40 small profiles

To help you identify and act upon the opportunities that will offer your business the best return on investment this report provides:

- Global forecasts for the market value of operations contracts, capital investment and regional market size forecasts
- A database of over 2,000 PPP projects containing in-depth data and information for each project listed
- Emerging investment trends, operation contract models and the opportunities that will emerge for the private sector in the next 5 years
- A global outlook for PPP projects and regional overviews, so you can see a complete picture of where the market is heading
- The key players in operation contracts and capital investment markets



Private Sector Participation in Water



Publication date: December 2014

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WATER FOR OFFSHORE OIL & GAS

OPPORTUNITIES IN SULPHATE REMOVAL, PRODUCED WATER TREATMENT AND DEEPWATER OPERATIONS

Price: **£2,200/\$4,000**

Water for Offshore Oil & Gas



Publication date: October 2014

THE REPORT INVESTIGATES THE FOLLOWING MARKETS:

- Brazil
- Gulf of Mexico
- North Sea
- Caspian Sea
- Persian Gulf
- West Africa
- Asia Pacific

Understand how increasing global energy demand and exploitation of offshore resources are creating opportunities for water companies with innovative solutions. *Water for Offshore Oil & Gas* highlights the exciting opportunities for water companies to provide solutions to meet these market developments.

This report is a must-have resource if you want to identify the markets and regions experiencing the most significant growth.

OPPORTUNITIES

This report explores the two major avenues of opportunity for water companies working in the sector.

1. PRODUCED WATER MANAGEMENT

The report investigates regional regulations and water management practices, so you can understand the challenges E&P's face and how these obstacles are creating avenues of opportunity for water treatment suppliers.

2. WATER INJECTION AND ENHANCED OIL RECOVERY

- Sulphate Removal Systems waterfloods and pressure maintenance.
 We explore the opportunities for solutions that enable E&Ps to maintain production levels and increase well productivity
- Low-salinity water explore the future potential for companies offering low-salinity pre-treatment solutions that can improve the 'wettability' of reservoirs and maximise production for E&P's
- Enhanced oil recovery (EOR) outlines how advanced water treatment solutions can support chemical injection for EOR



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WATER FOR ONSHORE OIL & GAS

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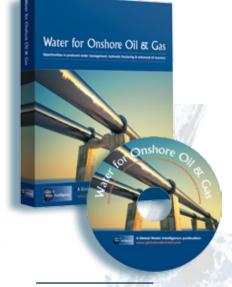
OPPORTUNITIES IN PRODUCED WATER MANAGEMENT, HYDRAULIC FRACTURING AND ENHANCED OIL RECOVERY

Price: **£2,200/\$4,000**

By 2035, the IEA predicts that global oil production will increase to 97 million barrels per day to meet growing demand. Global gas production is also projected to reach 5 trillion cubic metres per year. Managing the increased volumes of produced water associated with this production – and sourcing water for operations – is becoming more challenging. Scarce water resources have pushed operators to reuse produced water for water floods and fracturing fluids. Tighter environmental regulations are restricting the usual methods for disposing of produced water, encouraging operators to look at new approaches.

There are huge long-term opportunities for oilfield service companies and water technology providers offering solutions to manage these challenges. This report showcases the prospects in this growing market, covering:

- **Produced Water Management** Growing volumes of produced water are creating opportunities for advanced water treatment for reuse in hydraulic fracturing and enhanced oil recovery (EOR) processes, transport of this water, and disposal.
- **Hydraulic Fracturing** Region-by-region, we show you opportunities in pretreatment of fracturing fluids, water sourcing and chemical services
- Enhanced Oil Recovery In a market where oil producers need to maximise resources in mature oil fields or to extract unconventional resources, EOR is becoming a huge area of opportunity for water companies. We look at the prospects for secondary and enhanced oil recovery



Publication date: April 2014

REGIONAL ANALYSIS

This report is your guide to the unique opportunities in the most attractive segments of this market. Find what's going on in:

- North America Bitumen extraction in Canada, tight oil in the USA, coalbed methane and shale gas in the USA
- Latin America Steam injection for heavy oil extraction in Colombia and Venezuela, and recent development of shale gas potential in Argentina and Mexico
- Asia-Pacific Coal seam gas in Australia, and recent developments in coal bed methane extraction in Indonesia and China
- Middle East Improved and enhanced oil recovery from fields in Kuwait, Saudi Arabia, Iraq and Oman
- Europe and Africa Potential developments of shale gas and coalbed methane resources

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 12 month subscription: £2,200/\$4,000

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- China Industrial Water Markets £2,200/\$4,000
- Desalination Markets 2016 £2,500/\$4,550
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