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Consumer Water Treatment Systems: Canada

July 2018



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About This Report

Scope

This report forecasts to 2022 consumer water treatment system demand in nominal US dollars at the manufacturer level in Canada. Total aftermarket component demand by value is also forecast to 2022. Total demand is segmented by product in terms of:

- under-sink
- countertop
- faucet-mounted
- flow-through and other point-of-use products such as shower and bath filtration systems
- point-of-entry

Total demand is also segmented by technology as follows:

- conventional filtration
- membrane separation
- other technologies such as distillation, ultraviolet disinfection, and ozone treatment

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; total aftermarket component demand and the various segments are reported at five-year intervals for 2007, 2012, and 2017.

This report covers the market for consumer water treatment systems primarily designed to decrease the amount of contaminants in water in households. Systems purchased by consumers for personal use outside of the home (e.g., during leisure activities, pleasure, work, or school) are also considered, as are aftermarket components such as replacement filters and membranes. Refrigerator water filters and pitchers are excluded because these systems are originally sold to equipment manufacturers and only the replacement units are sold to consumers. Water softeners are also excluded from this report.

The technology under which a particular product is classified is determined by the highest level of treatment in that system. For instance, if a product includes both conventional filtration and reverse osmosis, it is labeled as a reverse osmosis system because that technology removes the most contaminants.

For any given historical year, US dollar amounts are developed in consideration of values expressed in the applicable local currency, when available. These local currency values are converted to US dollars at the average annual exchange rate for that year, and those exchange rate trends are used to evaluate the overall value series. For forecast years, the

About This Report

US dollar amounts assume the same annual exchange rate at that prevailing in 2017. All figures cited are in US dollars unless otherwise specified.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Consumer Water Treatment Systems: Canada (FA90023) is based on *Global Consumer Water Treatment Systems*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 7 | NAICS & SIC Codes Related to Consumer Water Treatment Systems

| NAICS/SCIAN 2007 | | SIC | |
|---|--|------------------------------------|---|
| North American Industry Classification System | | Standard Industrial Classification | |
| 325998 | All Other Miscellaneous Chemical Product and Preparation Manufacturing | 2899 | Chemicals and Chemical Preparations, Not Elsewhere Classified |
| 333319 | Other Commercial and Service Industry Machinery | 3589 | Service Industry Machinery, Not Elsewhere Classified |

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

About This Report

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Consumer Water Treatment Systems, July 2018

Freedonia Industry Studies

Global Water Filtration Equipment Markets, November 2017

Consumer Water Treatment Systems in the US, October 2017

Global Disinfection Equipment Market, August 2017

Global Water Treatment Chemicals Market, June 2017

Global Filters Market Forecasts, March 2017

Global Air & Fluid Filters Market, January 2017

Activated Carbon, October 2016

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Bottled Water: United States

Consumer Air Treatment Systems: United States

Major Household Appliances: United States

Nonwovens: United States

Water Disinfection Equipment: United States

Water Filtration Equipment: Canada

Water Treatment Chemicals: Canada

Water: United States

World Activated Carbon

World Air & Fluid Filters

Freedonia Custom Research

Trade Publications

DEMAND-ASME Global Development Review

Desalination

Journal of Desalination & Water Reuse

Electronic House

Filtration + Separation

Hardware + Building Supply Dealer

HomeWorld Business

Water Conditioning & Purification Magazine

Water Environment & Technology

Water & Wastewater International

WaterWorld

Agencies & Associations

Canadian Water Quality Association
Environment and Climate Change Canada
International Bottled Water Association
International Water Association
National Science Foundation
Natural Resources Canada
Statistics Canada
United Nations Comtrade
Water Quality Association
World Health Organization