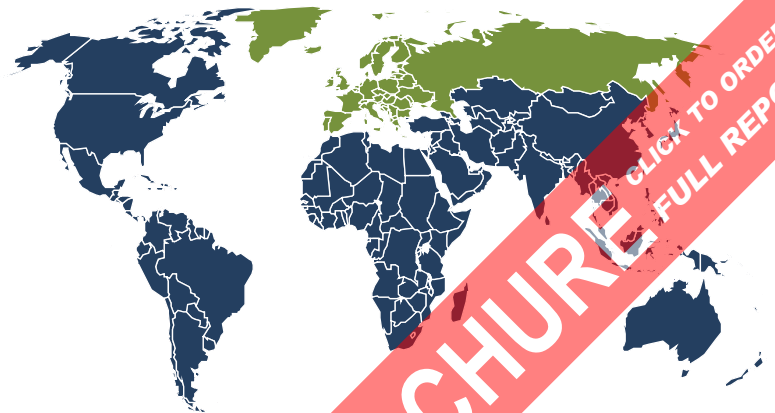




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# Consumer Water Treatment Products: Europe

January 2022



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# About This Report

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## Scope

This report forecasts to 2025 consumer water treatment products demand in nominal US dollars at the manufacturer level in Europe. Total demand is segmented by product in terms of:

- point-of-entry systems
- point-of-use systems
  - under-sink
  - countertop
  - faucet-mounted
  - flow-through and other point-of-use systems, such as atmospheric, showerhead, reusable water bottles, and filter straws
- replacement parts

System demand (excluding replacement parts) is segmented by technology as follows:

- conventional filtration
- membrane separation
- distillation
- other technologies such as ultraviolet (UV) disinfection and ozone treatment

To illustrate historical trends, total demand is provided in annual series from 2010 to 2020; the various segments are reported at five-year intervals for 2010, 2015, and 2020.

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.

Excluded from the scope of this report are refrigerator water filters and pitchers because these systems are originally sold to equipment manufacturers and only the replacement units are sold to consumers. Water softeners are also excluded from the scope of this report.

For any given historical year, US dollar amounts are developed based on values expressed in the applicable local currency, when available. These local currency values are converted to US dollars using the average annual exchange rate for that year, and those exchange rate trends are then utilized to evaluate the overall value series. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2020.

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

For the purposes of this report, Europe encompasses the following countries:

**Table 6 | Countries in Western Europe**

Andorra	Germany*	Italy*	Portugal
Austria	Gibraltar	Jersey	Saint Pierre and Miquelon
Belgium	Greece	Liechtenstein	San Marino
Channel Islands	Greenland	Luxembourg	Spain*
Denmark	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands*	United Kingdom*
France*	Isle of Man	Norway	Vatican City

\*Major consumer water treatment product markets.

Source: The Freedonia Group

**Table 7 | Countries in Eastern Europe**

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

\*Major consumer water treatment product markets.

Source: The Freedonia Group

## Sources

*Consumer Water Treatment Products: Europe* (FE90023) is based on *Global Consumer Water Treatment Products*, 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, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and 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 8 | HS Codes Related to Consumer Water Treatment Systems**

HS Code	Definition
842121	Water Filtering or Purifying Machinery & Apparatus

Source: United Nations Statistics Division

## 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.

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 Products*

### Freedonia Industry Studies

*Behind the Wall Plumbing*

*Global Filters*

*Global Housing*

*Global Prefabricated Housing*

*Global Water Treatment Equipment & Chemicals*

*Indoor Air Quality Equipment*

*Nonwovens*

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*Commercial Building Construction: United States*

*Construction: United States*

*COVID-19 Market Impact Analysis*

*Global Demographics*

*Global Macroeconomy*

*Housing: Europe*

*Prefabricated Housing: Europe*

*Water: United States*

### Freedonia Custom Research

### Trade Publications

*DEMAND: ASME Global Development Review*

*Desalination*

*Electronic House*

*Filtration + Separation*

*Hardware + Building Supply Dealer*

*HomeWorld Business*

*Journal of Water Reuse & Desalination*

*Water Conditioning & Purification Magazine*

*Water Environment & Technology*

*Water & Wastewater International*

*WaterWorld*



## Agencies & Associations

European Union

European Water Association

Eurostat

International Bottled Water Association

International Monetary Fund

International Water Association

National Science Foundation

Organisation for Economic Co-operation and Development

United Nations

Water Quality Association

World Bank

World Health Organization