



Freedonia Focus Reports
US Collection

Water Treatment Products: United States

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About This Report

Scope

This report forecasts to 2023 US water treatment product demand in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- conventional filtration
- membrane equipment
- other equipment such as aerators, deionization equipment, and disinfection equipment
- corrosion and scale inhibitors
- coagulants and flocculants
- biocides
- other chemicals such as chelating agents, dewatering aids, fluoridation chemicals

Total demand is also segmented by market as follows:

- municipal
- manufacturing
- other markets such as aquaculture and agriculture, ballast water treatment, and commercial and residential

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; the various segments are reported at five-year intervals for 2008, 2013, and 2018.

Water treatment systems can be broadly divided into equipment and chemicals. Equipment demand includes demand for both water treatment systems and related consumables (i.e., replacement filtration media, cartridges, and membranes). Excluded from this report are basic filtration screens and non-treatment equipment such as monitoring and metering systems; pipes and tanks; and pumps. Large portable treatment systems for use in emergency situations are included here, although personal water treatment devices (such as those marketed for backpackers and other outdoor sports participants) are excluded. Related services – including system design and maintenance – are also excluded.

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.

Sources

Water Treatment Products: United States (FF70026) is based on [Global Water Treatment Equipment & Chemicals](#), 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 nongovernmental 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 5 | NAICS & SIC Codes Related to Water Treatment Products

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
212322	Industrial Mining Sand	1446	Industrial Sand
221310	Water Supply and Irrigation Systems	1781	Water Well Drilling
237110	Water and Sewer Line and Related Structures Construction	2819	Industrial Inorganic Chemicals, Nec
325613	Surface Active Agent Manufacturing	2843	Surface Active Agents
325998	All Other Miscellaneous Chemical Preparation Manufacturing	2869	Industrial Organic Chemicals, Nec
333318	Other Commercial & Service Industry Machinery Manufacturing	4941	Water Supply
335129	Other Lighting Equipment Manufacturing		

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 Water Treatment Equipment & Chemicals

Freedonia Industry Studies

Activated Carbon

Consumer Water Treatment Systems in the US

Food Safety Products in the US

Pipe Products & Markets

Freedonia Focus Reports

Beverages: United States

Beverage Retail: United States

Bottled Water: United States

Consumer Water Treatment Systems: Canada

Consumer Water Treatment Systems: United States

Global Consumer Water Treatment Systems

Potable Water Pipe: United States

Precast Water & Waste Handling Products: United States

Water: United States

Water Transport Services: United States

Freedonia Custom Research

Trade Publications

Treatment Plant Operator

Water & Wastes Digest

Water & Wastewater Treatment

Water Intelligence Online

Water Online

Water Quality Products

Water Technology

WaterWorld

Agencies & Associations

American Water Works Association

Association of Water Technologies

International Water Association

National Rural Water Association

United States Census Bureau

Water Quality Association