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Global Collection



Global Water Treatment Products

June 2019



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About This Report

Scope

This report forecasts to 2023 global demand for water treatment products by type, market, and major world region in nominal US dollars at the manufacturer level. Type segments include:

- membrane equipment
- conventional filtration
- other water treatment equipment such as disinfection, deionization, and distillation equipment
- corrosion and scale inhibitors
- coagulants and flocculants
- biocides
- other water treatment chemicals such as pH adjusters, chelating agents, and dewatering aids

Reported markets encompass:

- municipal
- manufacturing
- other markets such as commercial and residential, oil and gas, and electric power generation

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, type, market, and regional demand (including type and market segments) are provided 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 the scope of this report are basic filtration screens and non-treatment equipment such as monitoring and metering systems; pipes and tanks; and pumps. Related services – including system design and maintenance – are also excluded.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2018.

About This Report

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

Global Water Treatment Products (FW70026) is based on 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 9 | 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	3589	Service Industry Machinery, Nec
		4941	Water Supply

Source: US Census Bureau

About This Report

Table 10 | NACE Codes Related to Water Treatment Products

NACE Code	Definition
3600	Water collection, treatment and supply
3700	Sewerage
3281	Treatment and disposal of non-hazardous waste
3822	Treatment and disposal of hazardous waste

Source: European Commission

Table 11 | HS Codes Related to Water Treatment Products

HS Code	Definition
2833	Sulfates; alums; peroxosulfates (persulfates)
2835	Phosphinates (hypophosphites), phosphonates (phosphites) and phosphates; polyphosphates, whether or not chemically defined:
2841.70	Molybdates
2847.00.00	Hydrogen peroxide, whether or not solidified with urea
2933.21.00	Hydantoin and its derivatives
3808.99.30	Formulated biocides based on 2-methyl-4-isothiazolin-3-one, or 2-n-octyl-4-isothiazolin-3-one, or 4,5-dichloro-2-n-octyl-4-isothiazolin-3-one, or mixtures of 5-chloro-2-methyl-4-isothiazolin-3-one and 2-methyl-4-isothiazolin-3-one; and Metaldehyde
8421.21	Machinery; for filtering or purifying water
8539	Electrical filament or discharge lamps, including sealed beam lamp units and ultraviolet or infrared lamps; arc lamps; light-emitting diode (LED lamps); parts thereof

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.

About This Report

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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The Freedonia Group

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Freedonia Industry Studies

Activated Carbon

Consumer Water Treatment Systems in the US

Food Safety Products in the US

Global Activated Carbon

Global Aquaculture: Feed, Equipment, & Chemicals

Global Consumer Water Treatment Systems

Global Filters

Global Membrane Separation Technologies

Global Nonwovens

Global Pumps Market

Pipe: Products & Markets

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Water & Wastes Digest

Water & Wastewater Treatment

Water Intelligence Online

Water Online

Water Quality Products

Water Technology

WaterWorld

Agencies & Associations

African Water Association

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ASIAWATER
Association of Water Technologies
EurEau
European Desalination Society
European Water Association
European Water Treatment Association
Eurostat
Indian Water Works Association
International Monetary Fund
International Water Association
National Rural Water Association
Organisation for Economic Co-operation and Development
SEWPACKSA (The Sewage Treatment Association of Southern Africa)
Water Quality Association
Water Reuse Europe
World Bank