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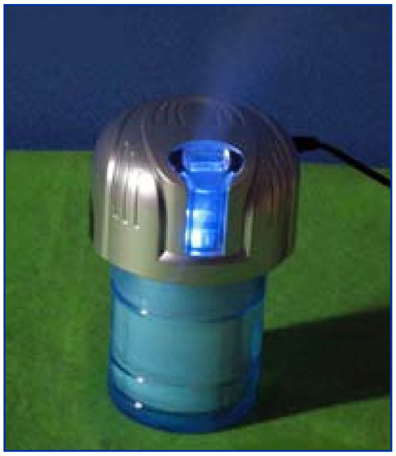

# Consumer Water & Air Treatment Systems

## US Industry Study with Forecasts for **2019 & 2024**

Study #3281 | July 2015 | $5500 | 356 pages


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# Consumer Water & Air Treatment System Demand

US Industry Study with Forecasts for *2019 & 2024*

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### MARKET ENVIRONMENT



### TECHNOLOGIES



### PRODUCTS



### REGIONAL MARKETS



### INDUSTRY STRUCTURE

***Growth will be supported by consumers purchasing or upgrading water and air treatment systems when they move into a new home, and by their increasing awareness of the benefits of water and air treatment systems.***

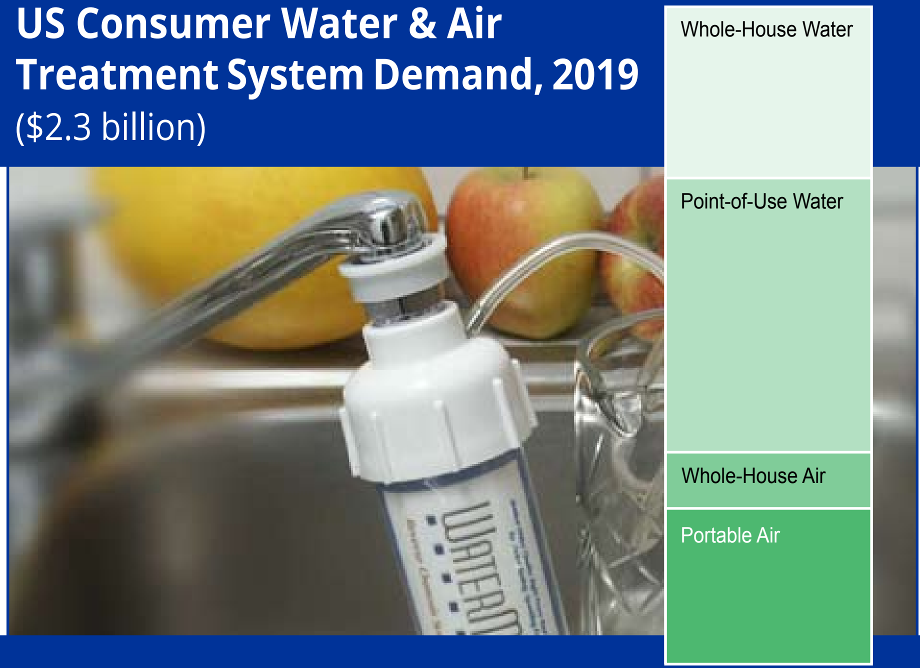
## US demand to rise 5.5% annually through 2019

Demand in the US for consumer water and air treatment systems is expected to rise 5.5 percent annually to $2.3 billion in 2019, as the housing recovery strengthens and consumer spending activity continues to improve. Rising home sales will also support the market, since many consumers purchase or upgrade water and air treatment systems when they move into a new home. Consumers are increasingly aware of the potential health and aesthetic benefits of water and air treatment systems, and are becoming more willing to invest in these products to improve the environment inside their homes. Media reports about water and air contamination affect consumer perception about local water and air quality and thereby drive sales.

## Point-of-use, portable types to remain dominant

A home's water and air can be treated at a single water outlet or in a single room (i.e., point-of-use water and portable air treatment systems) or by treating all of the water entering or air circulating through the home (i.e., whole-house systems). Point-of-use water treatment and portable air treatment systems will continue to account for the majority of value demand. These items benefit from relatively low initial costs, do-it-yourself installation, and the likelihood that consumers will purchase more than one such system. Demand for whole-house

**US Consumer Water & Air Treatment System Demand, 2019**
($2.3 billion)




systems will rise more rapidly through 2019, as new home construction rebounds from an extremely low 2009 level.

## Ion exchange, electrostatic systems to grow fastest

Various technologies can be used to treat the water and air in a home. In the water treatment segment, conventional filtration is the dominant technology, accounting for nearly 90 percent of volume demand and nearly 60 percent of value demand. However, the most rapid increases through 2019 will be for ion exchange systems, which are primarily used in whole-house configurations and will thus benefit from the rebound in home construction. Conventional filtration and electrostatic treatment accounted for the largest share of air treatment segment sales in value terms in 2014, with 47 and 40 percent of sales, respectively. Both of these technologies will also post above average gains through 2019, partly because they are the types used in the fast-growing whole-house treatment segment, but also because they are more efficient than other technologies on a stand-alone basis. In volume terms, conventional filtration was the leading air treatment technology, accounting for nearly two-thirds of 2014 sales; however, electrostatic systems will see faster growth through 2019, benefiting from their low operating costs and effectiveness.

# Consumer Water & Air Treatment System Demand

US Industry Study with Forecasts for ***2019 & 2024***

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## Sample Text, Table & Chart

**TABLE IV-6**

**POINT-OF-USE WATER TREATMENT SYSTEM DEMAND (million dollars)**

| Item | 2004 | 2009 | 2014 | 2019 | 2024 |
|---|---|---|---|---|---|
| Households (million) | | | | | |
| units/000 households | | | | | |
| Point-of-Use Water Treatment Sys (000) | | | | | |
| $/unit | | | | | |
| Point-of-Use Water Treatment Systems | | | | | |
| Under-the-Sink | | | | | |
| Countertop | | | | | |
| Faucet-Mounted | | | | | |
| Flow-Through | | | | | |
| Others | | | | | |
| % point-of-use | | | | | |
| Water Treatment System Demand | | | | | |

SAMPLE TABLE

Source: The Freedonia Group, Inc.

### TECHNOLOGIES

**Conventional Water Filtration**

Sales of conventional water filtration systems are foreca... 9 million units in 2019. This grow... ected rates for other treatment tec... less of the water treatment syste... e slower rate of growth reflects th... ional filtration segment. In addit... are primarily available in whole... al filtration systems are offered in every configuration. This variety of system choices, coupled comparatively low cost of conventional filtration systems, pr... support during the economic downturn and initially slow rec...

SAMPLE TEXT

These systems use adsorptive or mechanical filtration m... combination of the two, as the primary or only means of water treatment. While they are available at a variety of prices, conventional filtration systems are generally inexpensive. In addition, they are sold at mass merchandisers, drugstores, and other locations that are easily accessed by most segments of the population, which supports demand both by increasing consumer awareness and spurring impulse purchases of less expensive flow-through and faucet-mount systems.

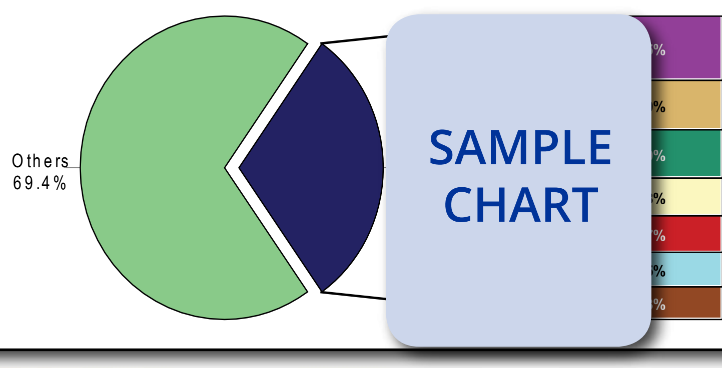
Conventional filtration-based systems are able to treat the most common water quality issues. Their ability to remove chlorine, sediment, and contaminants that cause foul odors in water, combined with their relatively low prices and accessibility, has made them a... a broad range of consumers. Furthermore, competition from... ter has lessened as consumers have become increasingly env... conscious.

Growth of conventional filtration systems will be restra... isting owners of these systems upgrade to systems that incor...



**CHART VI-1**

**CONSUMER WATER & AIR TREATMENT SYSTEM & CONSUMABLES MARKET SHARE ($4.6 billion, 2014)**

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# Sample Profile & Table, & Study Coverage

**TABLE V-7**

**MIDWEST WATER & AIR TREATMENT SYSTEM DEMAND**
**(million dollars)**

| Item | 2004 | 2009 | 2014 | 2019 | 2024 |
|---|---|---|---|---|---|
| Households (millions) | | | | | |
| $ systems/household | | | | | |
| Midwest Water & Air Treatment Systems | | | | | |
| By Subregion: | | | | | |
| Easst North Central | | | | | |
| West North Central | | | | | |
| By Type: | | | | | |
| Water | | | | | |
| Air | | | | | |
| % Midwest | | | | | |
| Water & Air Treatment System Demand | | | | | |

SAMPLE TABLE

Source: The Freedonia Group, Inc.

**COMPANY PROFILES**

**Electrolux AB**
St Göransgatan 143
10545 Stockholm
Sweden
46-8-73
http://gr

Sales: $
Employ
Key Pro

SAMPLE PROFILE

Electrolux is a manufacturer of consumer and professional appliances, and other products. The Company operates in six segments: Major Appliances, Europe, Middle East, and Africa; Major Appliances, North America; Major Appliances, Latin America; Major Appliances, Asia/Pacific; Small Appliances; and Professional Products. In September 2014, Electrolux agreed to acquire the GE Appliances division (Louisville, Kentucky) of General Electric Company (Fairfield, Connecticut). The division, which produces refrigeration, cooking, laundry, dishwashing, and home comfort products, had 2014 revenues of approximately $5.9 billion and employed 12,000. However, in July 2015, the US Department of Justice filed a lawsuit to block the acquisition; the companies still plan to complete the transaction by the end of 2015, pending regulatory approval.

The Company is involved in the US consumer water and air treatment system industry primarily via a licensing agreement with the Nortek Global HVAC LLC subsidiary (O'Fallon, Missouri) of Nortek Incorporated (Providence, Incorporated). Under the terms of the agreement, Nortek Global HVAC markets air cleaners in whole-house, electronic, high-efficiency media, and/or ultraviolet (UV) models under Electrolux's FRIGIDAIRE, TAPPAN, GIBSON, KELVINATOR, and

 287

## STUDY COVERAGE

This Freedonia study, ***Consumer Water & Air Treatment Systems***, presents historical demand data (2004, 2009, 2014) plus forecasts for 2019 and 2024 in technology, product and regional market of the US. The study also considers key market environment factors, examines the industry structure, analyzes company market share and profiles 35 competitors in the US industry.

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## Related Studies

### World Consumer Air Treatment Systems

This study analyzes the global market for consumer air treatment systems. It presents historical data (2004, 2009, and 2014) and forecasts (2019 and 2024) by product type (whole-house, portable), technology (e.g., conventional filtration, electrostatic, ionization), world region and major country. Demand for replacement air filters is also included. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

*#3343..............October 2015.................$6400*

### World Consumer Water Treatment Systems

This study analyzes the world consumer water treatment system industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by type (point-of-entry, point-of-use), aftermarket component, technology (e.g., conventional filtration, membrane separation), world region, and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

*#3341..............October 2015.................$6300*

### World Membrane Separation Technologies

This study analyzes the global membrane industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by type (e.g., microfiltration, reverse osmosis, ultrafiltration), market (e.g., water treatment, wastewater treatment, food and beverage processing, pharmaceutical and medical), world region and major country. The study also considers market environment factors, evaluates company market share and profiles industry players.

*#3325........... September 2015...............$6500*

### Water Treatment Equipment

Demand for water treatment equipment in the US is expected to rise 5.3 percent annually to $15.0 billion in 2019. Conventional filtration will remain the largest product segment, while disinfection equipment and membrane systems will be the fastest growing types. The municipal market will remain dominant while resource extraction leads gains. This study analyzes the $11.6 billion US water treatment equipment industry, with forecasts for 2019 and 2024 by product, market, and application. The study also evaluates company market share and profiles industry players.

*#3288................. May 2015....................$5300*

### World Filters

Global demand for filters is projected to increase a healthy 6.2 percent annually to $80.0 billion in 2018. Most gains will come from large, developing industrial areas with nascent regulatory schemes, such as China and Indonesia. Manufacturing will be the fastest growing market, with rising production benefiting aftermarket filter demand. This study analyzes the $59.1 billion world filter industry, with forecasts for 2018 and 2023 by product, market, world region, and for 22 countries. The study also evaluates company market share and profiles industry players.

*#3152..................July 2014....................$6500*

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