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World Consumer Water Treatment Systems

Industry Study with Forecasts for 2019 & 2024

Study #3360 | January 2016 | \$6400 | 444 pages

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INDUSTRY STRUCTURE

- 1 World Consumer Water Treatment System Market Share, 2014 334

Gains in demand will be driven primarily by increasing market penetration in less developed markets, such as China, India, other developing Asian countries, and much of the Africa/Mideast region.

World demand to rise 12% annually through 2019

Global demand for consumer water treatment systems will advance nearly 12 percent annually to \$16.3 billion in 2019. Gains will be driven primarily by increasing market penetration in less developed markets, such as China, India, other developing Asian countries, and much of the Africa/Mideast region. In these areas, rising incomes, coupled with increasing concerns about poor water quality and expanding consumer awareness about the types of water treatment systems available, will propel demand growth. Economic improvement in several of the more developed geographic markets, particularly where there are ongoing recoveries in housing markets, will also support gains.

Developing & developed area markets differ greatly

The reasons for market growth greatly differ between developing and developed areas. In developing markets, water quality is typically poor, supplies are stressed, and public treatment infrastructure is insufficient where available. Therefore, some additional step is needed to remove biological contaminants, sediment, or chemicals that can harm health. In these countries, the traditional methods for obtaining clean water are boiling drinking water or purchasing water in bottles, jugs, or other large containers. These methods are more costly than water treatment equipment over the long term, but have

World Consumer Water Treatment Demand, 2019 (\$16.3 billion)



low up-front costs, so their use has persisted in poorer areas. However, consumers are increasingly adopting supplemental water treatment systems in response to industry efforts to educate consumers about the types and benefits of treatment systems that are available. In these markets, rising consumer incomes, coupled with the ongoing introduction of low-cost, entry-level water treatment systems, will also enable more people to afford these systems.

In contrast, publicly treated, high quality water is widely available in developed markets, particularly in urban areas. Therefore, consumers often purchase water treatment systems to improve aesthetic traits such as taste and smell,

although more advanced products that are designed to remove contaminants not regulated by public water authorities are also purchased. Other advanced systems have features that heat or chill water, make ice, or add flavors. These products are particularly popular in places such as Japan and South Korea, where water treatment systems are viewed more as appliances, rather than as functional attachments to the plumbing system. Still, rural residents, even in developed areas, may lack access to publicly treated water, so they are more likely to purchase point-of-entry and other higher-level consumer water treatment systems to handle private water sources.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Demand by Type

In 2014, China was the largest market in the world for consumer water treatment systems with 26 percent of total sales. This position is due to the country's large population and active consumer market, which generates a high level of sales, despite the fact that market penetration remains quite low.

Going forward, as the annual per capita income continues to rise, the market for water treatment systems will continue to grow. The market is being driven by the need to address water pollution and polluted aquifers that remain in many areas. To improve the quality of water leaving treatment plants, officials have installed approximately 60 percent of the water mains in Chinese cities that are lead-lined, allowing treated water to pick up secondary contaminants. Contamination is worsened by older plumbing pipes in some buildings and, as a result, the water reaching homes is often still of poor quality.

In addition, rising personal incomes will spur sales of consumer water treatment systems. In urban areas, increased wealth will allow consumers to trade up to better performing systems. In fact, many consumers are adding water treatment systems as part of upgrades to their residence, viewing these systems as a home improvement project that benefits the health of their family. This trend will be supported by rising awareness of and access to more affordable water treatment systems that will handle minor aesthetic problems, such as poor taste and odor. In rural areas, rising incomes will allow residents to buy home treatment systems either to replace or to supplement boiling drinking water.

Government efforts to rebalance the economy towards consumption, coupled with rising awareness of the health effects of drinking contaminated water, will also drive growth in the market.

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SAMPLE TEXT

TABLE V-4

FRANCE:
 CONSUMER WATER TREATMENT SYSTEM DEMAND BY TYPE

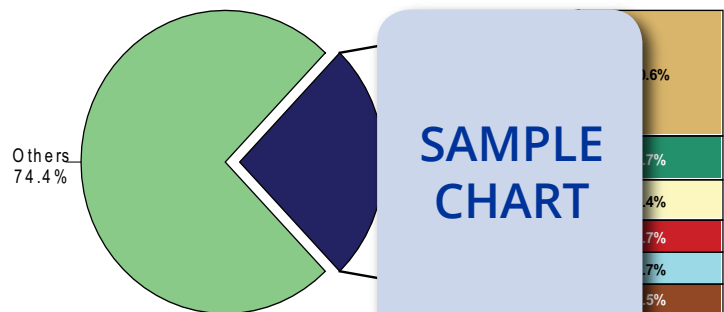
Item	2004	2009	2014	2019	2024
Households (millions)					
\$ systems/household					
Consumer Water Treatment (mil \$)					
Point-of-Entry					
Point-of-Use:					
Countertop					
Under-Sink					
Faucet-Mounted					
Flow-Through					
Consumer Water Treatment (000 units)					
Point-of-Entry					
Point-of-Use:					
Countertop					
Under-Sink					
Faucet-Mounted					
Flow-Through					

SAMPLE TABLE

Source: The Freedonia Group

CHART VIII-1

WORLD CONSUMER WATER TREATMENT SYSTEM MARKET SHARE
 (\$9.4 billion, 2014)



SAMPLE CHART

Sample Profile & Table, & Study Coverage

TABLE VII-16
RUSSIA: CONSUMER WATER TREATMENT SYSTEM DEMAND BY TECHNOLOGY
 (million dollars)

Item	2004	2009	2014	2019	2024
Nonagricultural Water Use (bil m ³)					
\$ systems/000 cubic m water use					
Russia Consumer Water Treatment					
Conventional Filtration					
Membrane Separation					
Other					
% Russia					
Eastern Europe Consumer Water Systems					

Source: The Freedonia Group



COMPANY PROFILES

ChungHo Nais Company Limited
 Komos Building, 2nd Floor
 10, Dodang-Dong
 Wonmi-Gu, Busan, Korea, S.
 South Korea
 82-32-6711111
 http://www.chungho.com

Annual Sales: \$100 million
 Employees: 100

Key Products: Water purifiers, and related filters and accessories

SAMPLE PROFILE

ChungHo Nais manufactures water and air purification products, water softeners, ice makers, and bidets. The Company operates as a subsidiary of Chung Ho Group (South Korea), a privately held firm.

The Company participates in the world consumer water treatment systems industry via the manufacture and sale of residential water purifiers in freestanding and countertop models. These purifiers, which are marketed under the IGUASSU brand name, employ carbon prefilters and postfilters, sediment filters, reverse osmosis (RO) membranes, and ultraviolet sterilization to remove contaminants from drinking water. In addition, select water purifier units feature ice making capabilities. Among these purifiers are IGUASSU ICE 500, IGUASSU T-461, and IGUASSU WINE CELLAR freestanding systems; and IGUASSU GLACIER and IGUASSU ICE T-3000 countertop models. Furthermore, ChungHo Nais produces replacement filters and membranes suitable for use in its IGUASSU water purifiers.

Production activities for ChungHo Nais are carried out at a facility in Jincheon, South Korea. The plant has the capacity to manufacture

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STUDY COVERAGE

World Consumer Water Treatment Systems is a Freedonia study that presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by type and technology in 6 regions and 19 major countries. The study also details key market environment factors, examines the industry structure, analyzes company market share and profiles 38 global industry competitors.

Related Studies

World Major Household Appliances

This study analyzes the world major household appliance industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., refrigerators and freezers, clothes washers and dryers, large cooking appliances, dishwashers), world region, and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3366..... February 2016.....\$6500

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..... February 2016.....\$6400

World Membrane Separation Technologies

World demand for membranes will rise 8.5 percent annually to \$26.3 billion in 2019. Industrializing countries such as India, China, Russia, Poland, and Brazil will show strong growth, while developed areas will remain intensive membrane users. Reverse osmosis, ultrafiltration, and nanofiltration will see above average growth. This study analyzes the \$17.5 billion global membrane industry, with forecasts for 2019 and 2024 by product and market for six world regions and 21 major countries. The study also evaluates company market share and profiles industry players.

#3325..... September 2015.....\$6500

Consumer Water & Air Treatment Systems

US demand for consumer water and air treatment systems will rise 5.5 percent annually to \$2.3 billion in 2019. Whole-house systems will be the fastest growing within both the air and water treatment segments. Among consumables, salt will offer the best growth opportunities, followed by water filters and membranes. This study analyzes the \$1.8 billion US consumer market for water and air treatment systems, with forecasts for 2019 and 2024 by technology, product, and US region. The study also evaluates company market share and profiles industry players.

#3281..... July 2015.....\$5500

Consumer Water Treatment Systems in China

Demand for consumer water treatment systems in China will grow 17.0 percent yearly to 26.2 billion yuan in 2017. Point-of-use systems will remain the dominant product, while point-of-entry systems will grow the fastest. Membrane separation will remain the key technology. This study analyzes the 12 billion yuan consumer water treatment system industry in China, with forecasts for 2017 and 2022 by product, aftermarket component, technology and regional market. The study also evaluates company market share and profiles industry participants.

#3168..... August 2014.....\$5300

About The Freedonia Group

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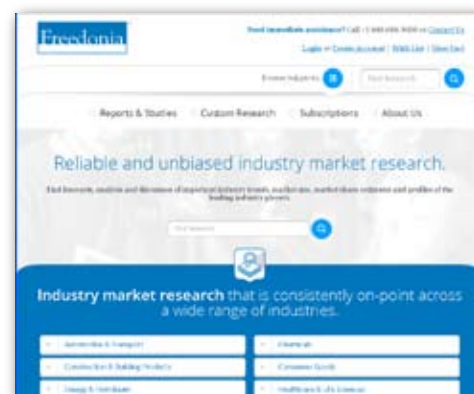
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