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Consumer Water Purification & Air Cleaning Systems

US Industry Study with Forecasts for **2014 & 2019**

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MARKET ENVIRONMENT

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Gains will be driven in part by consumer concerns about the quality of the air and water in the home and increased awareness of the health and aesthetic benefits of purification systems.

US demand to rise 5.2% annually through 2014

Demand for consumer water purification and air cleaning systems is expected to increase 5.2 percent per year through 2014, benefiting in part from projected rebounds in consumer spending on durable goods and in residential construction spending, which both suffered during the 2007-2009 recession. Gains will also be driven by consumer concerns about the quality of the air and water in the home and increased awareness of the health and aesthetic benefits of these systems. The development of quieter and more user-friendly systems and higher-cost systems that are designed to blend with consumers' home décor will also boost demand. Additionally, existing owners of purification systems are continuing to upgrade to higher-value versions featuring performance indicators and multiple treatment technologies.

Conventional filters to remain top water purifier

Water purification systems that feature conventional filtration media accounted for the majority of demand for water systems in 2009, with 76 percent of sales value. However, faster growth will be registered by higher-value reverse osmosis and distillation systems, although from significantly smaller bases. These systems can remove a broader range of contaminants compared to conventional filters. In general, the market size depends on the perceived quality of local tap water supplies. In 2009, point-of-use (POU) systems, which are installed at a single outlet, had the larger share of demand for water purification systems. However, sales of point-of-entry (POE) systems, which treat all water that enters a home, are expected to post faster growth through 2014, albeit from a very low base, due in part to the rebound in home building.

US Purification System Demand
($1.7 billion, 2014)

Electrostatic filters to pace air cleaner segment

Among air cleaners, conventional filtration systems accounted for the largest share of value demand with 47 percent in 2009, because they offer relatively inexpensive, thorough air cleaning and minimal to no ozone production. However, electrostatic air cleaners, which often operate more quietly and efficiently, are projected to achieve faster gains through 2014. Many consumers have shifted away from ionic air cleaners and ozone generators out of concern regarding the amount of ozone -- a lung irritant -- these systems generate. Portable air cleaners, which are designed to treat the air in a single room, accounted for the larger share of air cleaner sales in 2009. Sales of portable air cleaners are expected to continue to grow at a rate faster than that of whole-house air system sales, due in part to their lower purchase prices and operational costs and their ability to be used without a forced air HVAC system.

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Sample Text, Table & Chart

PRODUCTS

Under-the-Sink Units -- Sales of POU water p
that are installed under the sink are forecast to advanc
year to SAMPLE TEXT which is an accelerat
posted ince these systems a
than m lled during constru
sales w d construction reco
Furthe gan in late 2007 and
stricter ome households fro
expensi capable of thorough
households likely opted instead for a less expensive fa
pour-through system or deferred purchasing a system
credit conditions improve, these households are expec
more comprehensive under-the-sink unit or make the p
previously delayed.

Growth will also be driven by consumer interest in more comprehensive systems capable of removing compounds such as fluoride, chlorine and arsenic. Additionally, consumers are interested in higher-volume water treatment options. Under-the-sink systems, which are available using a variety of treatment technologies, are generally the POU systems best suited to providing large amounts of highly treated water. Furthermore, the number of states that allow small water utilities to use POU systems as a cost-efficient means of achieving compliance with water regulations has continued to grow. As more small public water systems opt to respond to changing water regulations by installing under-the-sink systems, there will be opportunities for growt
systems. Under-the-sink systems are also commonly used to
higher level treatment for residents who use water from priva
and hence are responsible for treating their own water. There
concern among private system users about elevated levels of
nitrates in well water, and the level of treatment necessary to
these compounds is more commonly available in under-the-s

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TABLE IV-2

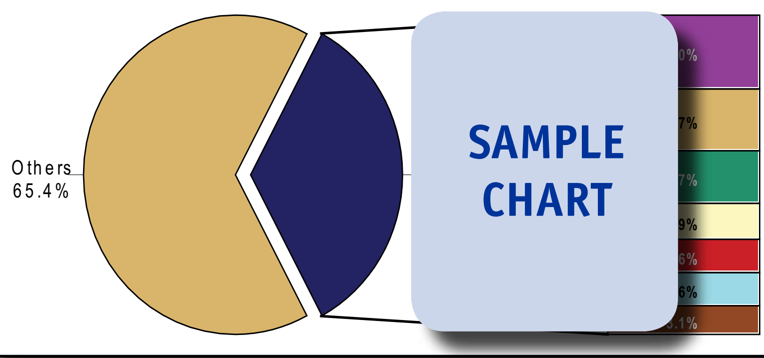
CONSUMER WATER PURIFICATION SYSTEM DEMAND BY TYPE
(million dollars)

Item	1999	2004	2009	2014	2019
Households (million)	1(				.3
units/000 households					5
Water Purification Systems (000)					0
Point-of-Entry					0
Point-of-Use					0
$/unit					8
Water Purification Systems					5
Point-of-Entry					0
Point-of-Use					5
% water					1
Water Purification/Air Cleaning Systems					2020

SAMPLE TABLE

CHART VI-3

CONSUMER WATER PURIFICATION & AIR CLEANING SYSTEMS' REPLACEMENT PARTS MARKET SHARE
($1.9 billion, 2009)



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Sample Profile, Table & Forecast

TABLE V-6

NORTHEAST WATER PURIFICATION & AIR CLEANING SYSTEM DEMAND (million dollars)

Item	1999	2004	2009	2014	2019
Households (millions)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$/household	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Northeast Water Purifiers/Air Cleaners	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Subregion:					
New England	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Middle Atlantic	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Type:					
Water	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Air	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% Northeast	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Water Purification/Air Cleaning Systems	[illegible]	[illegible]	[illegible]	[illegible]	2020

SAMPLE TABLE

COMPANY PROFILES

Flanders Corporation
531 Flanders Filters Road
Washington, NC 27889
252-946-8081
http://www.flanderscorp.com

Sales: $[illegible]
Employ[illegible]

Key Pro[illegible]

Fla[illegible] and markets air filters and relat[illegible]al and industrial markets. Th[illegible]tial and commercial heating, ventilation and air conditioning; semiconductor manufacturing; biotechnology; pharmaceutical; and nuclear power generating applications. The majority of Flanders' revenues are derived from the sale of replacement filters.

The Company participates in the US consumer water purification and air cleaning systems industry through the production and marketing of air filters under the FLANDERS-PRECISIONAIRE brand name. For residential applications, the Company makes such air filters as EZ FLOW and EZ FLOW II disposable, fiberglass types designed for use in furnaces and central air units; HD industrial-grade filters, which use fiberglass or synthetic polyester fiber media; PRE PLEAT 62MR11 pleated panel filters that use bi-component synthetic media to clean air; and PRE PLEAT 40 extended-surface pleated filters, which use nonwoven synthetic media that is manufactured from recyclable material.

Production operations for Flanders are conducted at US facilities in Washington (2) and Smithfield (2), North Carolina; Bartow, Florida;

SAMPLE PROFILE

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"Demand for water purification and air cleaning systems in the New England subregion is expected to advance 7.5 percent per year to $145 million in 2014, well above the national average. Although the subregion's population and GDP growth will lag the rest of the country, demand will be driven by other factors. For instance, New England has the highest prevalence of asthma in the country, and these consumers are among the most likely to purchase air cleaning systems for their homes."
--Section V, pg. 172

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Other Studies

World Water Disinfection Products

World demand for water disinfection products will increase 7.5 percent through 2014. In the developed world, gains will be prompted by efforts to reduce the environmental impact of water disinfection. In developing areas, efforts are underway to increase water treatment rates and quality up to advanced country standards. This study analyzes $5.7 billion the world water disinfection product industry, with forecasts for 2014 and 2019 by product, market, world region and for 20 countries. It also evaluates company market share and profiles industry participants.

#2723 .... February 2011 .... $5900

World Major Household Appliances

Global major appliance demand will rise 2.8 percent yearly through 2013, driven primarily by market penetration in developing countries. In developed regions, appliance sales will depend mainly on steady replacement demand, new home building and the development of new features that prompt upgrading. This study analyzes the 434 million unit world major appliance industry, with forecasts for 2013 and 2018 by product, world region and for 25 countries. It also evaluates company market share and profiles industry players.

#2588 ....December 2009 .... $6100

World Filters

Global demand for filters is forecast to expand 5.1 percent annually through 2013. Market advances in the developing areas will considerably outpace increases in the US, Western Europe and Japan. Sales of air purification filters will be the fastest growing segment while internal combustion engine and related filters remain the largest. This study analyzes the $45.5 billion world filter industry, with forecasts for 2013 and 2018 by product, market, world region and for 26 countries. It also evaluates market share and profiles industry players.

#2568 .... November 2009 .... $6100

Membrane Separation Technologies

US demand for membrane materials will rise 8 percent per year through 2014. Nonpolymeric membranes will outpace the dominant polymeric segment. Ultrafiltration and reverse osmosis types will be the fastest growing. Chemical processing and pharmaceutical/medical uses will be among the best market opportunities. This study analyzes the $3.3 billion US membrane industry, with forecasts for 2014 and 2019 by type, application and market. It also evaluates company market share and profiles industry players.

#2632 .... May 2010 .... $4900

World Water Treatment Products

Global water treatment product demand will rise 5.7 percent yearly through 2013. Large developing markets such as China and India will grow the fastest. Gains in developed areas will be based on efforts to increase water reuse, improve the aesthetic quality of drinking water and further reduce water contamination. This study analyzes the $44.6 billion world water treatment product industry, with forecasts for 2013 and 2018 by product, market, world region and for 23 countries. It also evaluates market share and profiles industry players.

#2563 .... November 2009 .... $6100

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