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# Consumer Water Purification & Air Cleaning Systems

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US Industry Study with Forecasts to **2010 & 2015**

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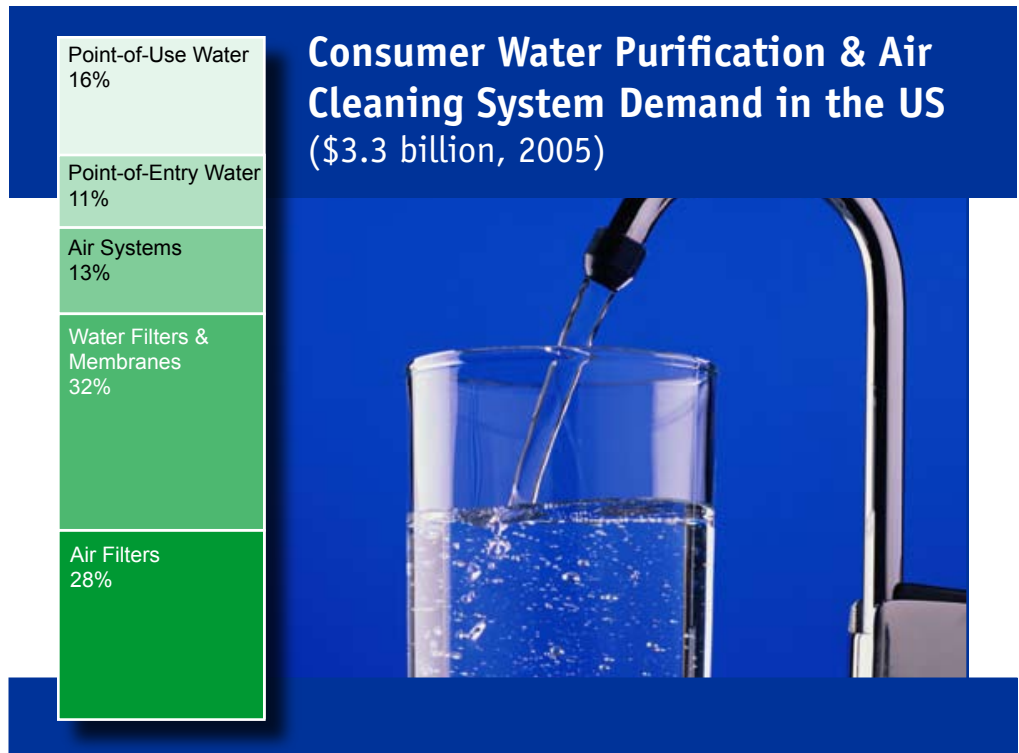
*Consumer concerns about the quality of the air and water in the home, and greater awareness of the healthful and aesthetic benefits of water purification and air cleaning systems, will help drive US demand.*

## US demand to grow 4.7% annually through 2010

Demand for consumer water purification and air cleaning systems is projected to increase 4.7 percent per year to \$1.7 billion in 2010. Gains will be driven by consumer concerns about the quality of the air and water in the home, and greater awareness of the healthful and aesthetic benefits of these systems. Market penetration will also be spurred by the development of quieter and more user-friendly systems. Additionally, existing owners of purification systems are continuing to upgrade to higher value versions with specialty features. The addition of specialty features such as the use of multiple technologies on a single unit will also fuel increases in demand in value terms. Sales of replacement filters and membranes are forecast to reach \$2.5 billion in 2010. Gains will be driven by rising penetration rates as well as marketing efforts and performance indicators that are aimed at improving replacement compliance.

## POU water, portable air systems to grow fastest

Point-of-use (POU) water purification systems, which are installed at a single outlet, had the larger share of demand for water systems in 2005, and are also expected to post stronger annual growth rates through 2010 compared to point-of-entry systems. Similarly, portable air cleaners, which are designed to treat the air in a single room, accounted for the larger share of sales of air cleaners in



2005 and will post faster growth through 2010 compared to whole-house air cleaners. In general, sales of both POU water systems and portable air cleaners benefit from factors such as lower initial costs, a wider range of available purification technologies, more user-friendly operation and, in most cases, do-it-yourself installation. Additionally, some consumers purchase more than one POU water system or portable air cleaner for use in a single home.

## Reverse osmosis, electrostatic systems to lead gains

Water purification systems that feature conventional filtration media accounted for the majority of demand for water

systems in 2005, 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 process a broader range of contaminants compared to conventional filters. In general, growth is largely dependent on the perceived quality of local tap water supplies.

Among air cleaners, conventional filtration systems accounted for the largest share of value demand with 44 percent in 2005. However, electrostatic air cleaners are projected to achieve the most rapid gains through 2010. Electrostatic air cleaners offer improved efficiency and a low operation cost.

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## Sample Text, Table & Chart

### PURIFICATION TECHNOLOGIES

#### Conventional Filtration

Sales of conventional water filtration systems, which use or mechanical filtration media or a combination of the two as the primary mode of treatment, are forecast to reach 125.2 million units in 2010. Sales of these systems are growing because they are generally inexpensive and have a wide range of price points, particularly in entry-level systems. Conventional filters, particularly those with activated carbon and carbon, provide the ability to remove a wide range of contaminants, including chlorine, lead, and sediment, commonly found in municipal or well water sources. The ability to remove such contaminants for a low price has made these systems popular, particularly in areas where lead is a problem. For example, some treatments used to disinfect municipal water supplies may leach lead from old distribution pipes into the water. Furthermore, because they are able to remove chlorine, sediment and other aesthetic contaminants, conventional filtration systems are also popular among people who have safe water but simply do not like its taste or smell. This factor opens the products up to a larger potential customer base compared to other water treatment systems.

Further growth will be restrained as some existing owners of water treatment systems trade up to higher end technologies, such as reverse osmosis and ultraviolet disinfection. Gains will also be slowed by performance limitations, such as the inability to remove health-threatening contaminants such as radionuclides, microbial contaminants and radon. Many conventional filters are unable to reduce volatile organic compounds (VOCs), disinfection byproducts, Cryptosporidium and Giardia lamblia cysts. Furthermore, the only type of conventional filter media capable of reducing arsenic levels to the newly mandated lower levels from points inside the home is activated alumina. Additionally, some consumers choose to purchase systems featuring other technologies because of the more frequent maintenance requirements of a conventional

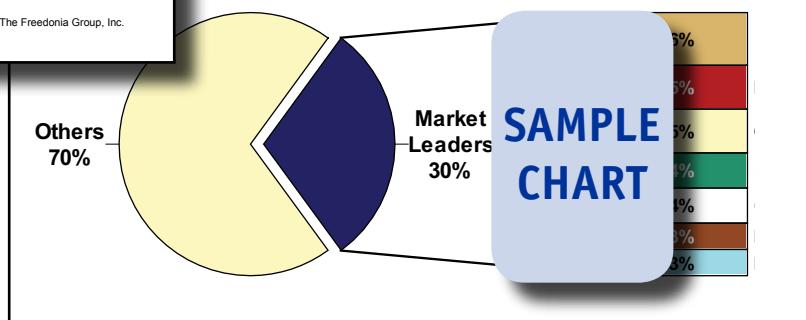
**SAMPLE TEXT**

**TABLE V-5**  
**CONSUMER WATER PURIFICATION & AIR CLEANING SYSTEM DEMAND BY REGION & TYPE**  
 (million dollars)

Item	1995	2000	2005	2010	2015
Households (millions)	101.0	107.0	113.1	119.3	125.2
\$/household					
Water Purification/Air Cleaning System					
By Region:					
Northeast					
Midwest					
South					
West					
By Type:					
Water					
Air	270	340	440	545	650

**SAMPLE TABLE**

**TABLE VI-1**  
**WATER PURIFICATION & AIR CLEANING SYSTEMS & PLACEMENT PARTS MARKET SHARE, 2005**  
 (\$3.3 billion)

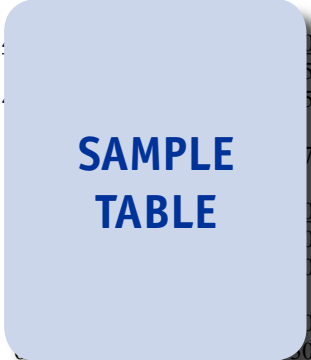


**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE IV-2**  
**CONSUMER WATER PURIFICATION SYSTEM DEMAND**  
 (million dollars)

Item	1995	2000	2005	2010	2015
Households (million)	101.2	107.0	113.1	119.3	125.2
systems/000 households	45	67	81	92	103
Water Purification Systems (000)					
Point-of-Entry					
Point-of-Use					
\$/unit	8				
Water Purification Systems					
Point-of-Entry					
Point-of-Use					
% water					
Water Purif & Air Cleaning Systems					



### COMPANY PROFILES

#### Hunter Fan Company

2500 Frisco Avenue  
 Memphis, TN 38114  
 901-743-1360  
<http://www.hun>



Annual Sales: \$ (5/06)  
 Employment: \$

Key Products: air purifiers and replacement filters

Hunter Fan manufactures air purifiers, humidifiers, ceiling and portable fans, thermostats and vaporizers for residential and commercial use. The privately held company also produces and sells other indoor and outdoor lighting products through its Hunter Lighting Group subsidiary (Jacksonville, Florida). Hunter Fan is owned by Lehman Brothers Holdings Inc. (New York, New York), a private equity firm.

The Company's air purifiers are marketed under the QUIETFLO and HEPATECH brand names. These products are made in sizes to clean rooms that measure up to 12 feet by 12 feet, 17 feet by 18 feet, or 20 feet by 20 feet. In addition, Hunter Fan produces and sells replacement filters for these purifiers.

The QUIETFLO air purifiers use an activated carbon pre-filter to reduce cooking, tobacco and pet odors, as well as lint, pet hair and dust. These purifiers then further clean the air with a high-efficiency particulate air filter to capture 99.97 percent of particles as small as 0.3 microns in diameter. Hunter Fan's HEPATECH system incorporates a washable pre-filter to remove large dust particles, lint and pet hair; and a HEPATECH electret filter that eliminates 99.97 percent of particles that are as small as 0.1 microns in diameter. Certain models in the

"Point-of-entry (POE) water purification systems, which are also known as whole-house or in-line systems, process all the water used throughout the home. Demand for such systems is forecast to advance 3.0 percent per year to 405,000 units in 2010, a pace below the average projected for the aggregate water purification systems market. Growth will be largely restrained by ..."

--Section IV, pg. 86



**OTHER STUDIES**

**World Water Treatment Products**

Global demand for water treatment products will grow 6.4% annually through 2011. Advances will be the fastest in the developing world, especially China and India. Gains in more established markets will be driven by technology upgrades such as higher-end membranes in desalination and other uses. This study analyzes the \$29.3 billion world water treatment product industry, with forecasts for 2011 and 2016 by product, market, world region and 20 countries. It also details market share and profiles major players.  
 #2276 ..... 01/2008 ..... \$5800

**Nonwovens**

US demand for nonwoven roll goods will grow 4.5% annually through 2011, driven by healthy gains in key markets such as filtration, construction and wipes. Spunbonded nonwovens will remain the dominant product based on performance advantages, new applications and more demand for composite nonwovens featuring spunbonded webs. This study analyzes the \$4.7 billion US nonwovens industry, with forecasts for 2011 and 2016 by material, product and market. It also details market share and profiles major firms.  
 #2271 ..... 11/2007 ..... \$4600

**World Nanomaterials**

The global market for nanomaterials will reach \$4.2 billion by 2011 and remain concentrated in the US, Western Europe and Japan. Products making the greatest initial commercial impact are nanoscale versions of conventional materials such as silica, titanium dioxide, alumina, iron oxide, and zinc oxide. This study analyzes the \$1 billion global nanomaterials industry, with forecasts for 2011, 2016 and 2025 by product, market, world region and for 15 countries. It also discusses R&D and profiles major participants.  
 #2215 ..... 08/2007 ..... \$5500

**Nonwovens**

US demand for nonwoven roll goods will grow 4% annually through 2009 based on healthy gains in filtration, construction, wipes and electronics uses. Spunbonded nonwovens will remain dominant while air laid types will grow the fastest. Cotton fibers will see the fastest growth, benefitting from consumer preference for natural fibers. This study analyzes the \$4.2 billion US nonwovens industry to 2009 and 2014 by material, product and market. It also evaluates company market share and profiles major firms.  
 #2022 ..... 01/2006 ..... \$4300

**Filters**

US filters demand will grow 4.2% yearly through 2011. Gains will be driven by ongoing sales in the dominant aftermarket, pending laws for cleaner air and reduced emissions, as well as increasing penetration of motor vehicle cabin air filters and home air and water filters. Fluid filters will remain the largest segment while air filters will grow the fastest. This study analyzes the \$9.8 billion US filter industry to 2011 and 2016 by product and market. It also evaluates market share and profiles leading competitors.  
 #2164 ..... 04/2007 ..... \$4500

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