

Water Filtration - US - 2022

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This report looks at the following areas:

- The impact of inflation on water filtration
- The impact of COVID-19 on water filtration
- Market performance of water filtration devices and filters
- The importance of proving product efficacy
- Consumer interest in health and safety claims
- Consumer attitudes around hydration, water filtration and drinking water safety

The water filtration market has shrunk slightly since 2020, however the market remains significantly larger than before the pandemic thanks to increased consumer interest in health and safety. The market is expected to continue to see small declines over the next few years as customers cut back on spending due to inflation and spend more time out-of-home, reducing the use of their personal filtration devices. Since current ownership of filtration devices is high following a pandemic-led surge in purchases, filter replacement sales will be more important than ever for maintaining market share in the years to come.

Luckily for water filtration brands, heightened focus on health and safety means consumers are ripe for engagement. 65% of Americans are trying to drink more water as they look to improve their health. However, consumer price sensitivity is a significant barrier to purchase when it comes to water filtration products. This sentiment is likely exacerbated by consumers' access to free tap water and the convenience associated with water bottles, especially as consumers spend more time away from home. As consumers increasingly look to take care of not only their bodies but also their planet and communities, water filtration products stand to benefit from environmentally friendly positioning as long as they can first prove their products' efficacy in terms of safety and improved taste. Water filtration brands can compete against tap water by focusing on health and safety and against water bottles by focusing on value and sustainability.



“The water filtration market has declined slightly since consumers have returned to out-of-home activities and have cut back on dispensary spending due to inflation.”

– **Ashley de Hechavarria,**
Health and Wellness Analyst

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