



Report Snapshot

Report Title

Atmospheric Water Generator (AWG) Market Size by Product (Cooling Condensation, Wet Desiccation), By Application (Industrial, Commercial, Residential), COVID-19 Impact Analysis, Regional Outlook, Growth Potential, Competitive Market Share & Forecast, 2022 – 2028

Actual Data	Base Year	Forecast Period
2017 to 2020	2021	2022 to 2028

Regions Covered

- North America (U.S.)
- Europe (Germany, UK, France, Italy)
- Asia Pacific (China, India, Indonesia, Malaysia, Thailand, Australia)
- Latin America (Brazil, Peru)
- MEA (Saudi Arabia, UAE, South Africa)



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Chapter 1 Methodology & Scope

1.1 Scope & definitions

Atmospheric Water Generator (AWG)- Atmospheric water generator is a device that extracts water from humid air. The device carries out an energy-intensive process that is widely suitable for commercial, residential, and industrial applications. AWG technology uses wet desiccation and cooling condensation process for water production. The AWG technology also refers to water from humidity, water from air, air-water generator, and air-water maker. Ideally, the humidity level should be about 50% or above for the machine's optimum performance.

AWG water production rates are highly dependent upon the amount of water vapor in the air and the air temperature to produce pure drinkable water. AWG generators at home-based units can produce between 1 to 50 litres of water per day and commercial units can produce between 100 to 10,000 litres per day. The AWG generators are reliable clean and safe water sources in areas where water is polluted or scarce.

Product

- Cooling condensation- The cooling condensation atmospheric water generator works by cooling the air below its dew point. In a cooling condensation-based atmospheric water generator (AWG), a compressor is circulated in the refrigerant through an evaporator coil and condenser, thereby lowering the air temperature to the dew point causing water to condense.

 Cooling condensation offers high output over other AWG machines. The rate of water produced in cooling condensation depends on the ambient air temperature, size of the temperature, and relative humidity. The cooling condensation water atmospheric water generators work efficiently when the temperature is above 18.3-degree celcius and relative humidity above 30%.
- Wet desiccation- Wet desiccation is a process where a brine solution is exposed to humid air to absorb water vapor from the air. This water vapor absorbed brine solution is then sent into a generator where the water vapor is extracted from the solution. Wet desiccation utilizes hygroscopic compounds to absorb water from atmosphere and then separate water from the ambient air. The extracted water by the system is purified for consumption. This technique is gaining importance on account of its efficiency and ease. The main disadvantage of wet desiccation is the complexity



introduced in terms of materials and systems. A variation of wet desiccation technology has been developed which is more environment friendly primarily using passive solar energy.

Application

- Industrial- Industrial atmospheric water generators are suitable for large industrial and community purposes. These industrial AWG machines could produce above 10,000 litres of water per day and are widely used in agriculture, growing food crops, and fisheries industries. They are used for fire sprinkler systems and in the agriculture sector for irrigation purposes. The AWG is useful for off-grid structures which have limited access to water supply. It also has wide application in building industry and heavy manufacturing industries including oil & gas, paper, and steel. The product can also be used in industrial sector for production of high-quality drinking water by minimum use of electricity.
- Commercial- Atmospheric water generators are mostly used where the water requirement is between 100 to 10,000 litres per day. The AWG machines are mostly employed in commercial places such as hotels, military base camps, hospitals, schools and rural. AWG is a reliable source of fresh, clean drinking water which requires electricity without the need for proper infrastructure. The machine is based on plug and solar solutions which are designed to meet the need of army bases, off-grid settlements, and hospitals. They can be used for commercial places seeking new drinking water sources due to presence of contaminated water or lack of clean drinking water.
- Residential-Residential atmospheric water generator is widely used in municipalities, villages, and cities. The AWGs can be installed on the residential sector rooftops which can produce safe drinking water and create water reservoirs for the residential applications. A water generator under ideal condition can generate water to fulfill small family needs for cooking and drinking purpose. The AWG models used in households generate varying amount of water depending on the atmospheric conditions. The water production amount from household models ranges from 1 to 50 litres of water per day. The current AWG technologies for household needs offer an option for back-up water supply and clean drinking water away from the tap.

The regional market has been defined as:

- North America includes the U.S.
- Europe includes Germany, UK, France, Italy,
- Asia Pacific includes China, India, Indonesia, Malaysia, Thailand, Australia
- Latin America includes Brazil



• The MEA includes Saudi Arabia, UAE, South Africa,

1.2 Methodology and forecast parameters

- The scope of the study includes actual market size for 2017, 2018, 2019, 2020 & 2021 and an annual forecast from 2022 to 2028
- Market estimates and forecasts have been provided in volume terms (Units) and in revenue terms (USD Million)
- The market was estimated using a pyramid approach, also referred to as a bottom-up methodology, where each region was estimated separately as an individual entity. The global market has been derived by integrating regional information.
 - Sales revenue reported by major companies
 - Consumption trends for different applications
 - Regional growth trends across application markets
 - o Regulatory scenario
 - Feedback received from key industry players
- AWG Market has been derived on the following basis
 - Price is calculated for product based on application including residential, commercial, & industrial.
 - Average price of AWG with respect to application:

Application	Price/unit
Industrial	USD xx /unit
Commercial	USD xx /unit
Residential	USD xx /unit

- To triangulate the market estimates, we have taken into account the following parameters:
 - Regional growth trends
 - Feedback received from key manufacturers, distributors and suppliers
 - Water scarcity data, by each country
 - Product adoption trends
 - Pricing trends



- Rising product consumption
- Rising demand from residential, commercial, & industrial application
- Forecasting involved the use of statistical modeling via regression analysis. For each regional level
 markets, key industry impact forces were analyzed and assigned weights in order of their
 importance. These weights were distributed across the forecast period and a regional growth rate
 was derived. Some of the major parameters include:
 - Historical market performance
 - Net sales of all companies and regional sales
 - o Product offerings by all the companies
 - Economic performance
 - o Global water supply data
 - Market dynamics
 - o Regulatory framework
 - o Application industry landscape
 - Technological advancements
 - o Infrastructure development
 - Raw material trends
 - Growing high AWG capacity demand in commercial sector
- Competitive landscape: Major companies have been identified and analyzed across all the regions. Revenues generated from the market players, the demand and sales by country & region, the data reported in the press releases by the companies operating in the atmospheric water generator market have been analyzed and assessed. For an extensive analysis of market trends, company profiling across each segment has been done. These companies have reported their performance in the global & regional markets, and current trends, which was an important base to arrive at the market estimate.
- Recent innovations, technology developments, product capacity expansion, etc. by the major market players has also been taken into consideration to depict demand and forecast industry growth
- Pricing trends are based on quotes received from regional & domestic manufacturers and distributors. For country level, per unit regional pricing has been considered
- Inflation has not been considered
- Totals have been rounded off



Regional market analysis:

North America:

- North America AWG market was USD xx million in 2021 and volume was estimated to be xx units.
 - The following sources were visited & considered while estimating the size and application share for North America AWG market.
 - Association of California Water Agencies (ACWA)
 - Safe Drinking Water Act (SDWA)
 - The National Primary Drinking Water Regulations (NPDWR)
 - American Water Works Association
 - International Water Association
 - Water Quality Association
 - Canadian Water Resources Association
 - Western Canada Water
 - Canadian Water Quality Association

1.3 Region-wise COVID-19 impact analysis:

1.3.1 North America

North America	Short Term	Medium Term	Long Term
Forecast Year	2022 - 2024	2024 - 2026	2026 - 2028
Impact	Severe	Moderate	Mild
Volume	xx Units –	xx Units –	xx Units –
votaine	xx Units	xx Units	xx Units

North America COVID-19 impact parameters are as follows:

Short Term:

- Rise in COVID-19 cases
- Disruption in raw material supply chain
- Low export forecast
- U.S. industrial sector affected following corona virus spread
- Indefinite closing of AWG manufacturing plant in North America



Medium Term:

- Declined COVID-19 cases
- Recovery of regional economy
- Re-establishment of supply chain
- Removal of suspension of work in factories
- Effectiveness of government policies to contain the COVID-19 spread

Long Term:

- Efficient supply chain management
- Smooth functioning of factories
- Removal of international trading restrictions in view of COVID-19

Note: The final RM will contain an updated methodology with COVID-19 impact parameters for the following regions

- Europe
- Asia Pacific
- Latin America
- MEA

1.4 Regional Trends

Key regional trends:

- North America
 - Challenges such as growing population, warming temperatures which can negatively affect
 the supply, and led to contamination of water resources with harmful toxins and chemicals
 will proliferate AWG demand thus boosting market growth in the region.

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	X
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	X
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	X
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Х



1.5 Data Sources

1.5.1 Paid sources

- Owler
- Factiva
- OneSource
- Zauba

1.5.2 Secondary sources

Region	Sources					
Global	 International Water Association ASHRAE Food and Agriculture Organization (FAO) World Bank Data UNEP 					
North America	 Association of Home Appliance Manufacturers (AHAM) NSF International Water Quality Association (WQA) Association of California Water Agencies (ACWA) Safe Drinking Water Act (SDWA) The National Primary Drinking Water Regulations (NPDWR) American Water Works Association 					
Europe	 European Commission European Healthcare Distribution Association European Water Association European Trade associations European Federation for Living APPLiA Home Appliance Europe 					
Asia Pacific	 China Urban Water Association Beijing, China - International Water Association Indian Water Works Association Japan Water Works Association Australian Water Association 					



	Brazilian Water Resource Association
Latin America & MEA	Water resources management in Chile
	The New Mexico Rural Water Association (NMRWA)
	Saudi Arabian Water Environment Association
	International Desalination Association
	The Arab Countries Water Utilities Association
	International Water Association-Southern Africa
	African Water Association
	D&B Hoover's
Others	• Journals
	Company Annual Reports

1.5.3 Primary

- XXXXXX
- XXXXXX
- XXXXXX
- XXXXXX

1.6 Industry Glossary

TABLE 1 Industry glossary

APAC	Asia Pacific					
CAGR	Compound Annual Growth Rate					
U.S.	United States					
UK	United Kingdom					
LATAM	Latin America					
MEA	Middle East & Africa					
UAE	United Arab Emirates					
AWG	Atmospheric Water Generator					



Chapter 2 Executive Summary

2.1 Atmospheric water generators industry 360° synopsis, 2017 - 2028

North America

Asia Pacific XX%

Latin America

XX%

MEA

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FIG. 1 Atmospheric water generators industry 360° synopsis, 2017 - 2028

Note: The above chart is for illustrative purpose only

2.2 Business trends

- Atmospheric water generator provides clean and safe water extracted from humidity in air through
 dehumidification process. It offers filtered water purified through multifilter channels including
 reverse osmosis, UV sterilization lights and carbon filters to ensure optimum purity in compliance
 with regulatory guidelines. AWG systems comprise of two methods such as cooling condensation and
 wet desiccation. Supporting regulatory guidelines by EPA, EU Commission and WHO pertaining to
 safe drinking water is likely to drive AWG market size.
- Climate changes accompanied with insufficient rainfall affecting water precipitation has led to
 decline in freshwater reserves which is likely to drive atmospheric water generator market size. Rapid
 urbanization and industrialization along with increasing population is another contributing factor
 towards depleting water resources thereby promoting product demand.



Increasing investments in technological innovations has led to development of AWG technology
having wide application scope in agriculture, military and oil & gas applications thereby stimulating
industry growth. Rise in water consumption along with less availability of natural water reserves may
have positive influence on product demand.

TABLE 2 Global atmospheric water generators market, 2017 - 2028 (Units) (USD Million)

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
Units	33,518	43,213	xx										
USD Million	1,311.9	1,666.8	xx										

2.3 Regional trends

- Rapid industrialization accompanied with growing population has led to changing lifestyle resulting into high water consumption. Depleting natural water reserves thereby stimulating AWG demand mainly in Asia Pacific region. Consumer inclination towards sustainable agriculture has promoted use of renewable AWG systems for irrigation. Additionally, Atmospheric water generators also provides favorable humidity and temperature for plant growth. Presence of various countries such as India and China with agrarian economy is likely to boost product demand in this region. Increasing investments in modifying AWG devices according to different application is likely to drive regional growth.
- Growing awareness regarding benefits of atmospheric water generator along with supporting
 regulatory initiatives to provide safe and clean drinking water mainly in U.S. and Europe is likely to
 favor regional industry growth. Atmospheric water generator systems work on renewable energy
 sources and consider ecofriendly thereby promoting product demand in environmentally conscious
 consumers which is likely to propel regional growth.



TABLE 3 Global atmospheric water generators market volume, by region, 2016 – 2027 (Units)

Region	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
North America	5,011	6,166	XX										
Asia Pacific	10,072	13,128	XX										
Europe	4,597	5,744	XX	хх	XX	xx							
MEA	8,419	11,030	XX										
Latin America	5,418	7,146	XX										
Total	33,518	43,213	xx										

TABLE 4 Global atmospheric water generators market revenue, by region, 2017 - 2028 (USD Million)

Region	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
North America	140.6	170.1	XX										
Asia Pacific	663.4	853.0	xx										
Europe	242.3	299.3	xx										
MEA	178.4	231.1	xx										
Latin America	87.2	113.2	xx										
Total	1,311.9	1,666.8	xx										



2.4 Product trends

- Cooling condensation AWG's turns water vapor in to dew by lowering down humid air temperature and has wide application scope in institutions, households, and industries such as paper, oil & gas industry due to high output and simple mechanism offering competitive advantage thereby driving product market size. Technological advancements to reduce equipment cost and power consumption is likely to propel industry growth. Scarcity of freshwater reserves in mainly in Middle East and Asia Pacific region is likely to fuel product demand.
- Wet desiccation utilizes hygroscopic compounds to soak humidity from air, then separates water from humid air. Silica gel, reactive lithium halides, and brine are some of the hygroscopic compounds used in this device. Increasing R&D spending to develop new hygroscopic compounds for soaking to replace crystalline brine salts is likely to boost product demand. Wet desiccation devices consume less power as compared to cooling condensation AWG's and are the most feasible water generator. Rising consumer consciousness along with stringent environmental policies is likely to propel industry growth.

TABLE 5 Global atmospheric water generators market volume, by product, 2017 - 2028 (Units)

Product	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022 -28)
Cooling condensation	32,904	42,407	xx										
Wet desiccation	614	806	xx	xx	XX	хх	xx						
Total	33,518	43,213	xx										

TABLE 6 Global atmospheric water generators market revenue, by product, 2017 - 2028 (USD Million)

Product	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022 -28)
Cooling condensation	1,290	1,639	XX										
Wet desiccation	21	27	XX										
Total	1,311.9	1,666.8	xx										



2.5 Application trends

- Atmospheric water generator has wide application scope in various industries such as oil & gas, paper, and steel industry. These industries use desalinated water for drinking which incurs high water loss and cost. AWG systems provide safe and clean water in a cost-effective way which is likely to boost product demand. Technological innovations pertaining to power supply through renewable resources such as solar energy in these devices may have positive influence on industry growth.
- Residential application may witness significant gains owing to prevailing water borne diseases along with increasing awareness. AWG devices are incorporated with multi-filtration mechanism along with RO and UV treatment which eliminates bacteria, viruses and other contaminants from water and supply healthy drinking water in compliance with regulatory guidelines led by EPA and WHO pertaining to maximum contamination limit. It provides oxygen rich water which helps in maintaining liver health, detoxification and regulates body metabolism which is likely to contribute towards product demand.
- Rising regional construction activities are supporting the AWG market demand in the region. The COVID-19 pandemic has posed multiple challenges to various sectors, wherein the residential sector witnessed reduction in construction and repairing tasks. Moreover, the imposition of lockdown sent shock waves throughout the housing market in March 2020 in Canada, suspending open houses and flat-lining sales during what is typically a high season for the market.

TABLE 7 Global atmospheric water generators market volume, by application, 2017 - 2028 (Units)

Application	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
Industrial	9,236	11,915	xx										
Commercial	6,498	8,311	xx										
Residential	17,785	22,986	xx										
Total	33,518	43,213	xx										



TABLE 8 Global Atmospheric water generators market revenue, by application, 2017 - 2028 (USD Million)

Application	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
Industrial	1,022.4	1,301.2	XX										
Commercial	272.0	343.2	XX	хх	хх								
Residential	17.5	22.4	XX	хх									
Total	1,311.9	1,666.8	XX	хх	xx	xx							



Chapter 3 Atmospheric Water Generator Market Industry Insights

3.1 Introduction

Atmospheric water generator (AWG) are the devices used to extract moisture suspended in ambient air. They are widely used in areas where it is difficult to obtain and lack of natural water reserves. Moreover, AWG's are reliable and safe source of water as it filters atmospheric water after extraction and remove bacteria and particulate impurities which results into chemical free and clean water thereby promoting product demand in domestic application to eliminate bottled drinking water.

Cooling condensation AWG are cost effective and consume less energy. Growing investments in technological innovations along with consumer adoption of AWG products owing to high purity offered by these systems thereby stimulating industry growth. Increasing consumer awareness along with rising demand for pure water due to prevailing waterborne diseases is likely to boost product demand in residential applications. Rise in economic standards mainly in India and China may drive industry growth.

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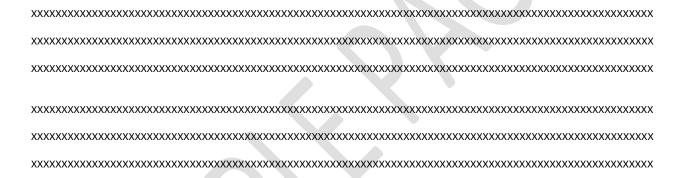
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3.2 Impact of COVID-19 outbreak

3.2.1 Global outlook

As per the industry trends, the global economy expanded by 4% in 2021, considering the widespread rollout of COVID-19 vaccines. The pandemic has caused a heavy toll of deaths & illnesses, plunged millions into poverty, and may depress economic activities & incomes for prolonged periods. It has also led to considerable human suffering and major economic disruptions. The COVID-19 spread to Japan, South Korea, Singapore, and other Asian countries, resulting in a sharp decline of the major Asian financial stock markets. The rising number of confirmed COVID-19 cases in France, Italy, Spain, Germany, and the UK affected the major financial markets in Europe. At the same time, the spread of COVID-19 reached countries in the MENA region and North America, resulting in a global economic slowdown.



3.2.2 Regional impact

3.2.2.1 North America

North America was significantly affected due to the transmission of COVID-19 in 2020. Governments of the U.S. and Canada imposed stringent lockdowns several times to curb the virus spread. Both governments have adopted different tactics to speed up the vaccination programs across the country to minimize the infection rate and improve the GDP. As per the information by Our World Data, until 9th February 2022, around 63.99% of the U.S. population was fully vaccinated and 11.60% partially vaccinated. Furthermore, in Canada, 80.5% of population was fully vaccinated, whereas 5.16% was partially vaccinated.



3.2.3 Industry value chain

3.2.3.1 Raw material suppliers

Coronavirus spread has led to value chain disruptions throughout the globe in each and every industry. The supply of the of raw materials used for manufacturing atmospheric water generators was also disrupted during the Covid-19 outbreak. Supply shortage of metals, refrigerants, pumps, compressors, dehumidifier, drive pump, air blower, condenser motors, RO systems, and water filter due to lack of transportation facilities may impact the supply chain of the industry thus restricting growth. Countries imposed stringent border restrictions to reduce the transmission of the virus which resulted in logistical challenges for optimal supply & distribution of raw material.

Companies are postponing the development of facilities for the production of raw material such as pumps, compressors, to reduce capital expenditure amidst weakening economic conditions which may hamper AWG production in the short to medium time frame. Moreover, the temporary closure of manufacturing plants or operations at reduced staff strength in China, Japan and Malaysia and may other countries along with freight restrictions has further weakened the availability of imports in early 2020. However, after the 3rd quarter of 2020 the market has rapidly gained traction and increase the production various raw material in the market.



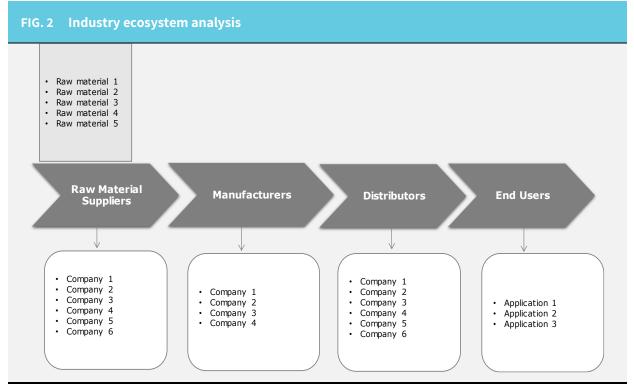
3.2.4 Competitive Landscape

3.2.4.1 Strategy

Atmospheric water generator manufacturers incurred considerable financial loss amid the pandemic due to a decline in the demand for atmospheric water generator in industrial sectors. Especially due to reduced working facilities in non-essential industries like textile and leather, and this water could be diverted for domestic consumption. However, diverting this excess water from industries to domestic sector is not easy. However, during the covid-19 outbreak has increase the water demand in domestic sector demand and water required for relief camps, temporary makeshift hospitals and quarantined places, piped water supply may not be an immediate option and we need to devise decentralised water solutions. Therefore, this diversion in the demand from other segment led to overcome the loss of companies during the covid-19 from industrial application.



3.3 Atmospheric water generator ecosystem analysis



Note: The above chart is for illustrative purpose only

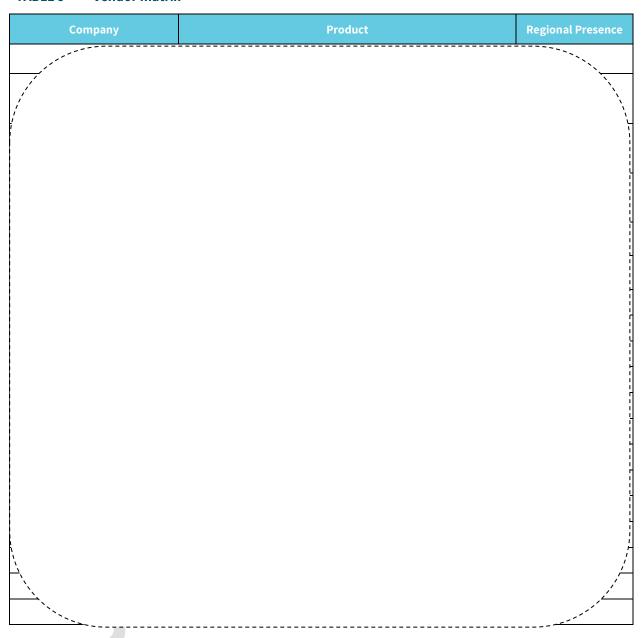
An atmospheric water generator (AWG) is a device that extracts water from humid ambient air. Declining freshwater resources along with rise in infrastructure spending should drive AWG market size. AWG is an appliance that employs condensing or dehumidification technology. The water is filtered and purified by various filters used including reverse osmosis, UV sterilization lights, and carbon. It uses sophisticated and latest technology which provides maximum amount of high-quality drinking water while using minimum electricity.





3.3.1 Vendor matrix

TABLE 9 Vendor matrix



3.3.2 Distribution channel analysis

XXXXXXXXXXXXXX	xxxxxxxxxxxxx	xxxxxxxxxxxx	XXXXXXXXXXX	xxxxxxxxxxxx	xxxxxxxxxxxxxxx	xxxxxxxxxxxxxx
xxxxxxxxxxx	xxxxxxxxxxxx	xxxxxxxxxxxx	xxxxxxxxxx	xxxxxxxxxxxx	xxxxxxxxxxxxxx	«xxxxxxxxxxxxxxx
xxxxxxxxxxx	xxxxxxxxxxxx	xxxxxxxxxxxx	xxxxxxxxxx	xxxxxxxxxxxx	xxxxxxxxxxxxxx	«xxxxxxxxxxxxxxxx
xxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxx	xxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	«xxxxxxxxxxxxxx



TABLE 10 AWG Market distribution channel analysis

Channel	Example
Collaboration	
Service Providers	
Distributors	[
Technology Providers	`\`\`

3.3.2.1 Collaborations/Partnerships

Companies collaborate or partner for technology development and product launches. This strategy will help the company establish & supply guarantees and royalties for product supply.

3.3.2.2 Distributors

Wholesalers or distributors play an important role in the distribution channel. They deliver products to various retailers, department stores, and small-scale industries.

3.3.2.3 Technology Providers

The company or entity develops, produces, or sells technology to facilitate product launches.



3.3.2.4 Service Provider

Organizations and suppliers are interdependent. The relationship develops & grows business acumen to achieve the desired goal.

3.3.3 Impacts of the COVID-19 on the industry value chain

Coronavirus spread rapidly from China to European countries such as Italy, Russia, Spain, the UK, France, and Germany. Later, the U.S. observed a sharp increase in the number of cases. Such surge in the cases with no solution has forced local governments to implement travel bans and regional lockdowns for months. These lockdowns have significantly affected the manufacturing sector, putting the supply chain at risk.

3.4 Pricing analysis

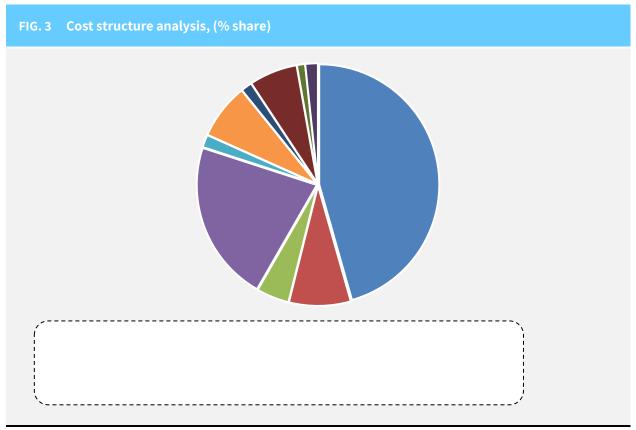
3.4.1 North America (USD/Unit)

Product		Historic	al Years	Base Year	Forecast Year							
rroddet	2017	2018	2019	2020	2021	2028						
		USD per unit										
Industrial	xx	xx	xx	xx	XX	XX						
Commercial	xx	xx	xx	xx	XX	xx						
Residential	xx	xx	xx	xx	XX	XX						

Note: The above prices represent average regional bulk buying pricing



3.4.2 Cost structure analysis



Note: The above chart is for illustrative purpose only

Atmospheric water generator devices are currently used by the industry as per customer convenience. All the devices are produced by condensation and desiccation processes. The filtration stage is applied to water that are essentially distilled out of the air. A good air filter should be able to remove most contaminants present in the air stream, while two water filters and careful design should be enough to handle the contaminants in the dehumidification method.



3.4.3 Covid-19 impact on pricing trends

The COVID-19 crisis had affected the production of major components used in the production of atmospheric water generator such as compressor, dehumidifier, drive pump, air blower, condenser motors, and RO systems, among others. The components manufacturing companies faced obstructions due to uncertain market conditions and disrupted supply chain activities owing to lockdowns and trade restrictions during COVID-19.

3.5 Regulatory landscape

3.5.1 U.S.

3.5.1.1 EPA, Safe Drinking Water Act

U.S. EPA, Safe Drinking Water Act applies to every public water system in the United States. There are currently more than 170,000 public water systems providing water to almost all Americans at some time in their lives. The responsibility for making sure these public water systems provide safe drinking water is divided among US EPA, states, tribes, water systems, and the public. SDWA provides a framework in which these parties work together to protect this valuable resource. US EPA sets national standards for drinking water based on sound science to protect against health risks, considering available technology and costs. These National Primary Drinking Water Regulations set enforceable maximum contaminant levels for contaminants in drinking water or required ways to treat water to remove contaminants. Each standard also includes requirements for water systems to test for contaminants in the water to make sure standards are achieved. In addition to setting these standards, US EPA provides guidance, assistance, and public information about drinking water, collects drinking water data, and oversees state drinking water programs.



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3.6 Technology and innovation landscape

3.6.1 Cooling condensation

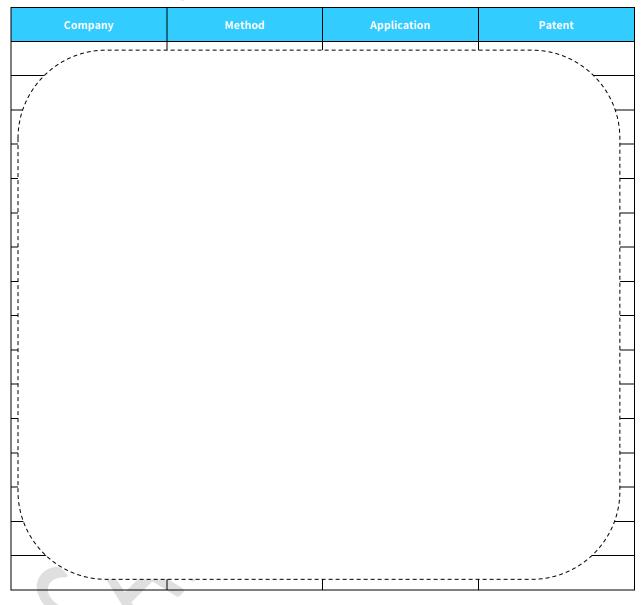
In a cooling condensation AWG process, a compressor circulates refrigerant through a condenser and evaporator coil thereby cooling the surrounding air. This usually lowers the air temperature, causing water to condense. The resulting water is then passed into a holding tank with purification and filtration system to help keep the water pure and reduces bacteria and viruses' risk which may be collected from the ambient air on the evaporator coil by the condensing water.





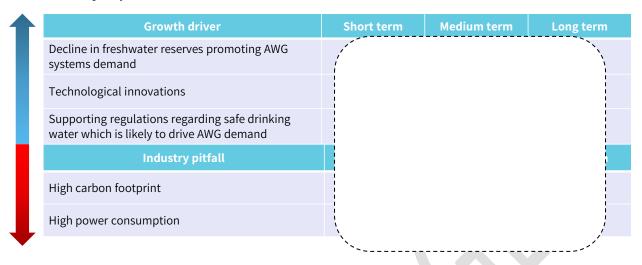
3.7 Patent analysis

TABLE 11 Patent landscape





3.8 Industry impact forces



3.8.1 Growth drivers

3.8.1.1 Decline in freshwater reserves promoting AWG systems demand

Insufficient rainfall leading to less precipitation of water in ground has resulted in declining freshwater reserves all over the world. Total fresh water reserves available in the world are around 2.5% of all the water reserves which accounts for over 7,000 cubic meters on an average. Increasing population is another factor contributing towards depletion of water reserves leading to lack of tap water supply which is likely to shift consumer preference towards bottled or other safe water supply thereby promoting atmospheric water generator demand.

According to UNICEF, over two-thirds of the population across the globe face severe water scarcity for at least one month every year and around two billion people live in countries with inadequate water supply. UNICEF forecasts that by 2025, over half of the global population will be living in countries facing water scarcity. 1 in 4 children is projected to be living in areas suffering from extremely high water stress by 2040. Thus, water scarcity has become a major issue globally. Thus, governments are planning for future water needs by finding available water resources to minimize the risk of depleting freshwater reserves. Government bodies are investing in new and advanced technologies to search for new methods for water generation. This trend is supporting the growth of the atmospheric water generator market.



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3.8.2 Industry pitfalls & challenges

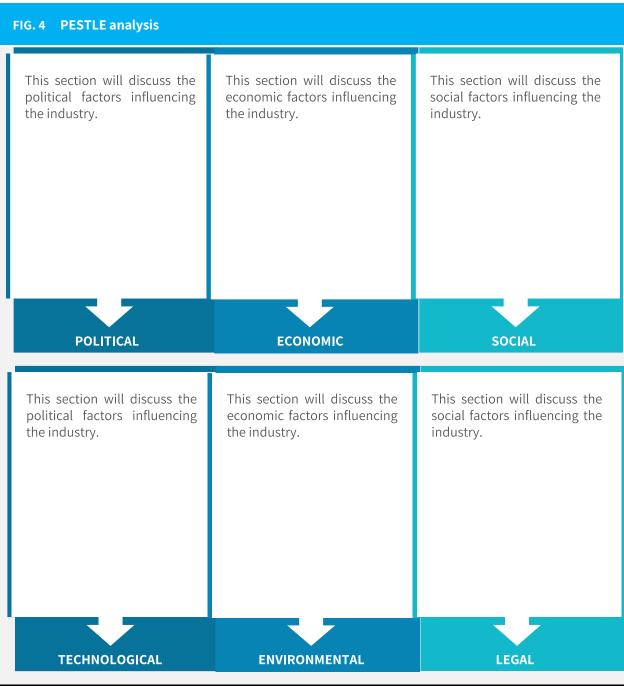
3.8.2.1 High carbon footprint

Atmospheric water generation technology works in a similar manner as dehumidifiers. It condenses the atmospheric air passed over a cooling coil and causes water to condense. This system contains a device controlling mechanism which requires a high amount of power to function. Coal based electricity when used to power these devices have a high amount of carbon footprint generated from the water source. Stringent regulatory norms regarding CO2 emission may challenge industry growth.





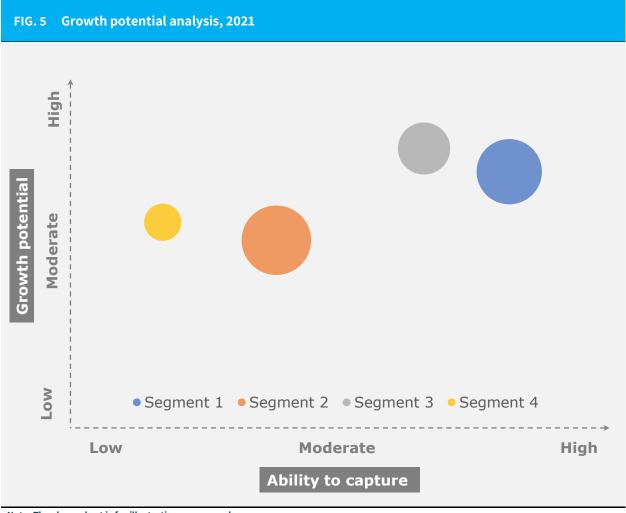
3.9 PESTLE Analysis



Note: The above chart is for illustrative purpose only



3.10 Growth potential analysis, 2021



Note: The above chart is for illustrative purpose only

Growth potential denotes the revenue opportunity offered by the segment while the ability to capture denotes the potential of a new entrant to capture the market share, taking into consideration the intensity of the competition.

Bubble size represents the present revenue.

AWG market size from residential applications was the highest market share. Growing adoption of AWG installation in residential sector owing to drinking water crisis should drive product demand particularly in Asia Pacific and Middle East & Africa. The AWGs can be installed on the residential sector rooftops which can produce safe drinking water and create water reservoir for the residential applications.



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3.10.1 Emerging business model

Business Models	Examples
Acquisitions/Partnerships	
New product launches	

3.10.1.1 Acquisitions/Partnerships

Partnership is a business agreement in which two or more companies agree to pool their resources and is characterized by shared risks & returns, shared ownership, and shared governance to accomplish business expansion or expand the product portfolio.

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3.11 Impacts of COVID-19 on atmospheric water generation demand, by application

3.11.1 Industrial

COVID 19 virus outbreak, there has been an increasing consumer awareness trend towards safe drinking water. However, the growing uncertainties surrounding the lockdown across the globe, thereby, industrial sectors have closed after second quarter of 2020 till first quarter of 2022, which has slowdown the growth of the market. COVID-19 is creating a serious impact on all the sectors of the economy. Atmospheric water generators are used in several industries including food and beverages, pharmaceutical, microbreweries, oil and gas, and agricultural sector.

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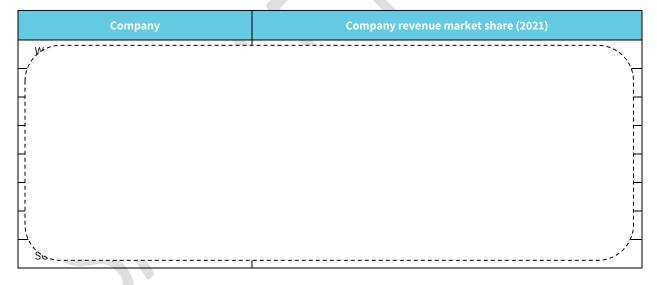


Chapter 4 Competitive Landscape, 2021

4.1 Introduction

The atmospheric water generator market is highly competitive with respect to prices and services provided to the end-users. The industry has presence of many manufacturers, retailers and distributors actively competing in the global market. The market may witness introduction of new products which may see early adoption as there is a significant amount of investment for product development. The industry may witness consolidation in the form of mergers & acquisitions or joint ventures to strengthen the product portfolio and increase the regional presence.

4.2 Company market share analysis, 2021



The company market share is based on the revenue basis. The revenue segment of each company has been analyzed depending on the product portfolio. The primary feedback from key opinion leaders (manufacturers, suppliers, and distributors) in the industry has been consulted, which has also formed the basis for the company market share.

Note: Atmospheric water generator market is highly fragmented in nature with range of small and medium market players operating in the market. Many of the market players are privately held companies which do



not disclose their financials. The table mentioned above indicates company market share analysis of some of the manufacturers of atmospheric water generator as per the primary interviews conducted with multiple companies & distributors.

<u>Small level</u> - The players in this category have very limited products in their portfolios and lack the capital required to expand. Most of these companies are either new entrants, small privately-owned businesses, or sole proprietorships. They have fewer employees and have lesser annual revenue than a regular-sized corporation or business.

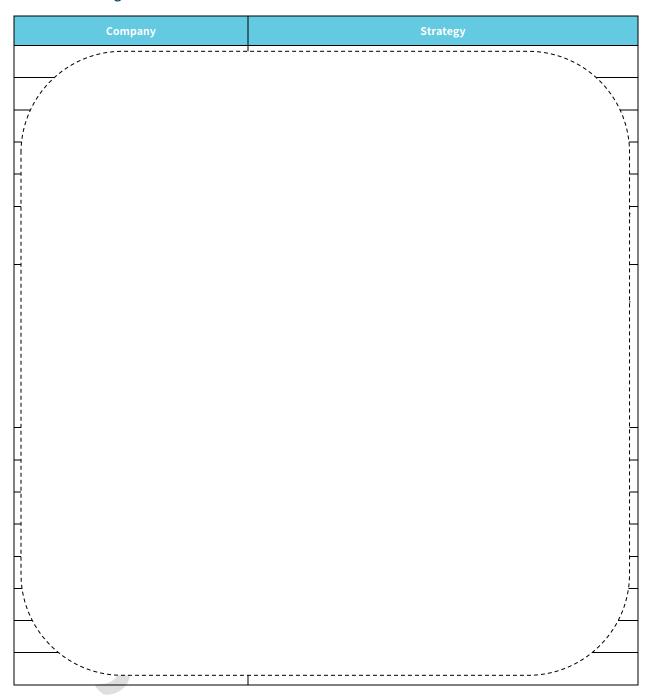
<u>Moderate/middle level</u> - The players in this category have an average growth profile with less aggressive strategies of expansion in terms of product and geography. In order to fulfill their long-term goals, their short-term goals need to be accomplished and they need a noteworthy profit margin for investing in expansions. These category players are also investing in different strategies to expand their profit margins.

<u>Top players -</u> The players in this category have a well-known brand name in the market. The players are undertaking product diversification, portfolio expansion, and setting up of plants and sales offices in numerous regions as a part of their growth strategies. Also, the players in the market are investing in research & development to innovate new product categories.

The atmospheric water generator market is fragmented in nature owing to the presence of large number of players in the market. Key players operating in the market include Water World Solution, Watergen Inc, Shenzhen FND, AW International Ltd, Water Technologies International, Genesis Systems LLC, Aqua Sciences, Drinkable Air Florida Inc., Neoom Group GMBH. Companies are engaged in new product formulations to cater to the increasing product demand, being the highest value-added product in various application includes domestic especially after covid-19 outbreak.



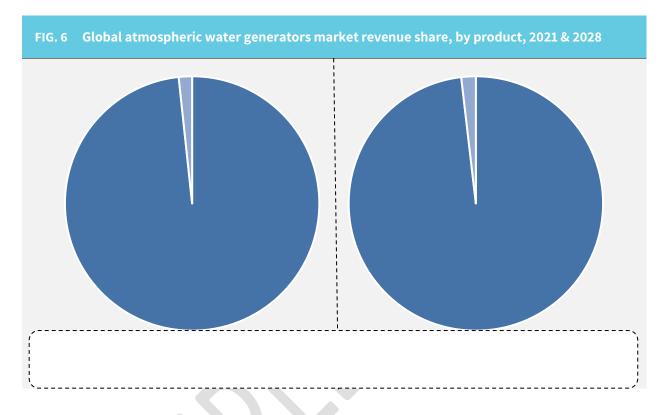
4.2.1 Strategic dashboard





Chapter 5 Atmospheric Water Generators Market, By Product

5.1 Global atmospheric water generators market revenue share, by product, 2021 & 2028



5.2 Cooing Condensation

5.2.1 Global atmospheric water generators market from cooling condensation product estimates & forecast, 2017-2028, (Units) (USD Million)

TABLE 12 Global atmospheric water generators market from water-based product, 2017 – 2028, (Units) (USD Million)

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
Units	32,904	XX											
USD Million	1,290.5	XX	XX	хх	XX	хх	xx	xx	xx	хх	xx	xx	хх



Advancement in AWG technology to minimize or reduce electricity and equipment cost is anticipated drive cooling condensation market growth. AWG technology uses a cooling condensation process to produce drinkable water for the usage of various applications including commercial, residential, and industrial. In a cooling condensation type, the air temperature is cooled below the dew point which results in condensation of the atmospheric water vapor. The condensed water is collected, purified, and utilized for various purposes in commercial, residential, and industrial sectors. The cooling condensation technology operates like a dehumidifier.



5.2.2 Global atmospheric water generators market from cooling condensation product, by region, 2017-2028, (Units) (USD Million)

TABLE 13 Global atmospheric water generators market from cooling condensation product, by region, 2017 – 2028, (Units)

Region	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
North America	4,909	xx											
Asia Pacific	9,822	xx											
Europe	4,517	xx											
MEA	8,339	хх	XX										
Latin America	5,317	хх	XX										
Total	32,904	xx											



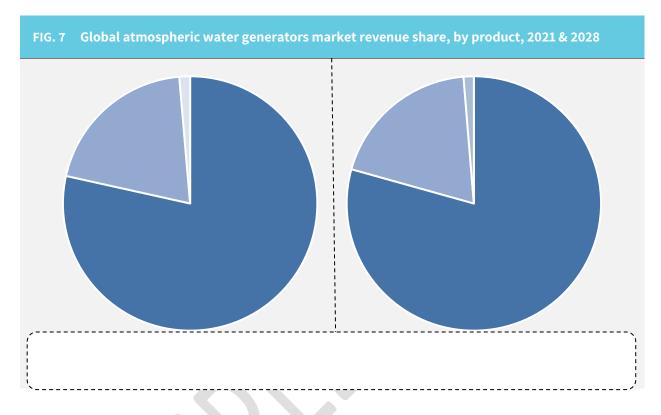
TABLE 14 Global atmospheric water generators market from cooling condensation product, by region, 2017 – 2028, (USD Million)

Region	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
North America	138.1	XX											
Asia Pacific	652.7	xx											
Europe	238.5	xx											
MEA	175.6	XX											
Latin America	85.6	XX											
Total	1,290.5	XX											



Chapter 6 Atmospheric Water Generators Market, By Application

6.1 Global atmospheric water generators market revenue share, by application, 2021 & 2028



6.2 Industrial

6.2.1 Global atmospheric water generators market from industrial application estimates & forecast, 2017-2028, (Units) (USD Million)

TABLE 15 Global atmospheric water generators market from industrial application, 2017 – 2028, (Units) (USD Million)

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
Units	9,236	XX											
USD Million	1,022.4	XX											



Industrial atmospheric water generators are suitable for large industrial, and communities use. They produce above 10,000 litres of water per day and are widely used in agriculture, growing food crops, and fisheries industries. It has wide application in building industry and heavy manufacturing industries such as steel, paper, and oil & gas. Growing demand for water to satisfy the needs for industrial sector along with changing climatic conditions is anticipated to drive atmospheric water generator demand for industrial application thus fostering market growth.



6.2.2 Global atmospheric water generators market from industrial application, by region, 2017-2028, (Units) (USD Million)

TABLE 16 Global atmospheric water generators market from industrial application, by region, 2017 – 2028, (Units)

Region	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
North America	787	xx											
Asia Pacific	4,960	xx											
Europe	1,600	xx											
MEA	1,259	XX											
Latin America	629	XX	хх										
Total	9,236	XX											



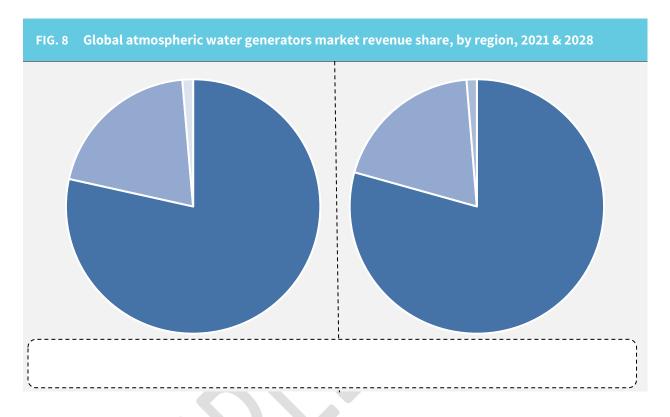
TABLE 17 Global atmospheric water generators market from industrial application, by region, 2017 – 2028, (USD Million)

Region	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
North America	91	XX											
Asia Pacific	516	XX	хх	XX	XX								
Europe	193	XX											
MEA	149	XX	хх	xx	XX								
Latin America	73	XX											
Total	1,022.4	XX											



Chapter 7 Atmospheric Water Generators Market, By Region

7.1 Global atmospheric water generators market revenue share, by region, 2021 & 2028



7.2 North America

7.2.1 North America atmospheric water generators market, 2017-2028, (Units) (USD Million)

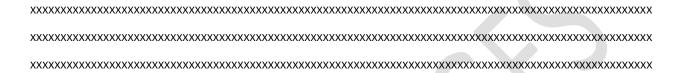
TABLE 18 North America atmospheric water generators market, 2017-2028, (Units) (USD Million)

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
Units	5,011	xx											
USD Million	140.64	xx											

North America atmospheric water generator market may witness strong gains owing to favorable regulatory norms pertaining to safe and clean drinking water in various public drinking water systems is likely to favor



regional growth. AWG systems consist of RO and UV treatment mechanisms which provide safe water free from heavy metals, pesticides, and chemical impurities. The U.S. is witnessing an increasing number of installations in commercial institutions such as hotels, banks, schools, offices, and households owing to the high risk of water borne diseases which is likely to contribute towards product demand thus boosting market growth. Presence of various companies engaged in developing brine solution technology and modifying design may have a positive influence on product demand in this region.



7.2.2 North America atmospheric water generators market estimates & forecast, by product, 2017 - 2028, (Units) (USD Million)

TABLE 19 North America atmospheric water generators market volume, by product, 2017 - 2028 (Units)

Product	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022 -28)
Cooling condensation	4,909	xx											
Wet desiccation	102	xx	хх	xx	xx	xx	xx	xx	xx	хх	хх	хх	xx
Total	5,011	xx											

TABLE 20 North America atmospheric water generators market revenue, by product, 2017 - 2028 (USD Million)

Product	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022 -28)
Cooling condensation	138.1	XX											
Wet desiccation	2.6	xx											
Total	140.64	xx											



7.2.3 North America atmospheric water generators market estimates & forecast, by application, 2017 - 2028, (Units) (USD Million)

TABLE 21 North America atmospheric water generators market volume, by application, 2017 - 2028 (Units)

Application	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
Industrial	787	XX											
Commercial	1,149	XX	хх	xx	xx	xx	xx						
Residential	3,075	XX											
Total	5,011	XX											

TABLE 22 North America atmospheric water generators market revenue, by application, 2017 - 2028 (USD Million)

Application	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2022- 28)
Industrial	91.1	XX											
Commercial	46.8	XX											
Residential	2.8	xx											
Total	140.64	xx											



Chapter 8 Company Profiles

8.1 Planets Water Corp

8.1.1 Business overview

Snapshot								
Headquarters	Isle of Man, UK							
Year of Establishment	2008							
Regional Presence	Europe							

Planets Water Corp. is primarily engaged in providing clean water solution to meet growing demand for clean and safe drinking water. The company endorse and distribute AWG which doesn't require water lines, pipes and plumbing for their operations and solely works on electricity. Industries it caters to includes office, residential complexes, commercial buildings, villages, and townships. The company produces pure drinking water for hot as well as cold purposes through their unique technology named Planetswater, which extracts water from the air. This technology enables the company to offer Atmospheric Water Generator of wide capacities ranging from 15 ltrs- 8- ltrs per day for home/office uses to around 10,000 ltrs per day for industrial uses. The company offers economical and energy efficient solutions of atmospheric water generators to mitigate rising water scarcity problems.

The company operates manufacturing facilities across three continents and also has a multidisciplinary research & development team. The company has global presence with distribution partnerships across U.S., Brazil, India, Australia, Mexico, Thailand, Vietnam, China, the Philippines, African countries, and CIS countries. The company provides licensed distributorships to enhance its global reach and market their products.

8.1.2 Financial data

Planets Water Corp is a privately listed company and hence does not report its financials.



8.1.3 Product landscape

Product/Service	Features	Applications
AWG Home/Office Device	 Available in range of production capacity of 15, 30 and 100 liters. Per day Low maintenance cost Plug-and-operate system Operable at a temperature range of 35°C and above Saves Water by wasting 85% less water than DE or sand filters, and 66% less than cartridge filters Saves Time by eliminating the task of manual cleaning other filters 	It is used in household and office environments.
AWG-C-Series Commercial/Industrial	 Helps reduce 'carbon footprint' Units present in range of production capacity of 100-5000 liters/ day Savings in size, weight and price 	 It is used in disaster relief camps, industries, and commercial application.
PlanetsWaterGEN 5000L	 Perfect for villages, off-grid settlements, and factories. The unit can be integrated into AWS farms It has a capacity of 5000 ltrs/1,321 gallons (per day) 	 Used in villages, factories, and farms
Planets Industrial AWG WaterGEN	 It has a capacity of 10000 ltrs/2,642 gallons (per day) It is the quickest and easiest water supply solution 	Used in emergency relief vehicles
Planets 500L WaterGEN	It has a capacity of 500 ltrs/132 gallons (per day)	 Used in schools, hospitals, commercial centers, or residential buildings.



8.1.4 SWOT analysis

FIG. 9 SWOT Analysis, Planets Water Corp



- Reduced carbon footprint
- Products manufactured are simple in design allowing lower prices and greater margin
- The AWG products offered by the company consumes 30%-65% less power



Relatively high capital expenditure and operating cost



- Regional expansion to other countries through mergers & acquisitions
- Technology development with increased investment in R&D
- Expansion in different countries to increase licensed distributors



- Competition in the market
- Lack of consumer awareness

8.1.5 Strategic Outlook

- In April 2020, Planets Water Corp. aims to expand its distribution network by offering PlanetsWater AWG 'Exclusive' Distributorship License that provides lower prices to the distributor. In addition, the distributor can further sell distributorships to third parties in other regions. The company Distributorship License cost varies based on the demographics such as population, per capita income, and geographic area
- The company emphasizes on product innovation to improve product efficiency and offer innovative products. The company has developed and launched new generation low power consumption AWG products that uses 30%-65% less power as compared to other brands available in the market.