

SAMPLE REPORT



GRAND VIEW RESEARCH

Atmospheric Water Generator

MARKET ANALYSIS, 2019

TECHNOLOGY



GRAND VIEW RESEARCH

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Atmospheric Water Generator

MARKET ANALYSIS, 2019

Market by Process: Cooling condensation, wet desiccation, and solid desiccation.

Market by End-Use: Residential, Commercial, and Industrial.

Market by Power Source: Electricity, Battery, Solar, and Others.

Market by Region: North America, Europe, Asia Pacific, Central & South America, Middle East & Africa.

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Sample Navigator

Sample Report

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This section includes sample market data points, ranging from trend analyses to market estimates & forecasts

How will it benefit me?

You will gain access to a synopsis of the market report.

Sample data points will help you validate market estimates & judge report quality

Table of Contents

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Executive Summary

Global atmospheric water generator (AWG) market is expected to grow owing to depleting water reserves and increasing water requirements.

According to UN, water consumption is expected to increase exponentially which will cause global water crisis.

Increasing investments to tap solar energy has resulted in adoption of solar equipment globally. Hence, solar based atmospheric water generators are expected to witness significant growth during the forecast period.

Atmospheric Water Generator (AWG) market is expected to grow over the forecast period owing to Technological advancements along with supportive governmental regulations.

Cooling Condensation segment is estimated to grow at the fastest CAGR during the forecast period owing to already adopted technology and suitable climatic conditions.

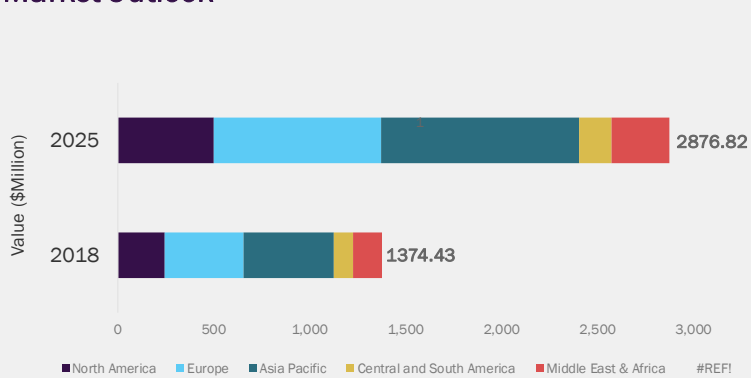
Industrial segment is expected to grow at the fastest CAGR during the forecast period owing to water pollution especially in industrial areas owing to release of untreated industrial waste in to water reserves.

Asia Pacific was estimated to be the fastest growing region at a CAGR of 11.94% during the forecast period. The Asia Pacific market is fueled by the rapid industrialization and increasing population increasing the water consumption as a result.

1.1 Market Outlook

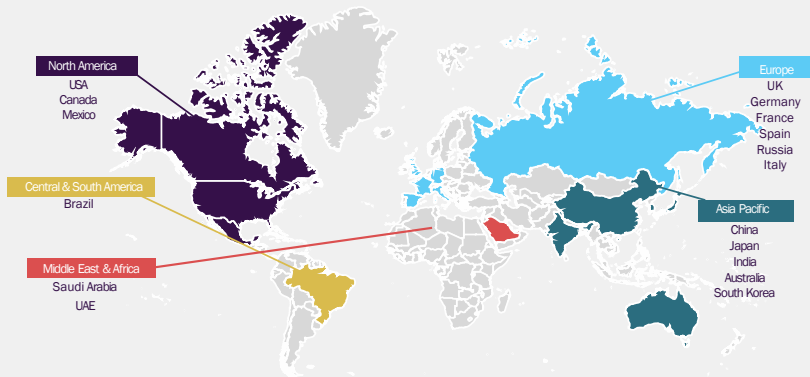
Fig.1 Atmospheric Water Generator (AWG) Market Outlook

Market Outlook

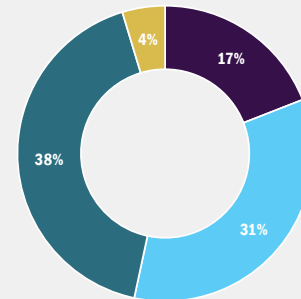


Region	CAGR% (2018-2025)	Growth Momentum*
North America	10.76%	LOW
Europe	11.37%	MEDIUM
Asia Pacific	11.94%	HIGH
Central & South America	6.97%	LOW
Middle East & Africa	11.05%	MEDIUM

Key Countries



Market Opportunity**



KEY FINDING

Asia Pacific region is expected to witness significant growth owing to rapid industrialization and increasing water consumption.

*Market opportunity equates to Incremental growth in volume & value (Δ=Y2025-Y2018)
 ** Growth momentum is factor of comparison between segmental CAGR% Vs overall market CAGR%

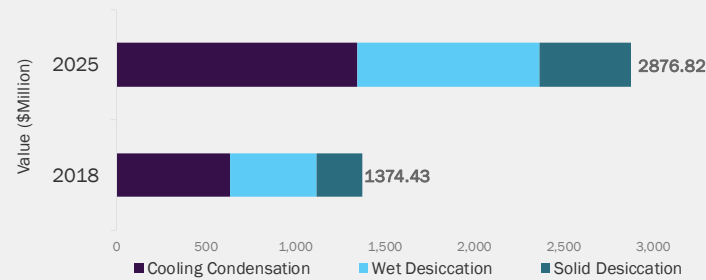
Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

1.2 Segmental Outlook

Fig.2 Atmospheric Water Generator (AWG) Market Segmental Outlook

Process Segmentation Analysis

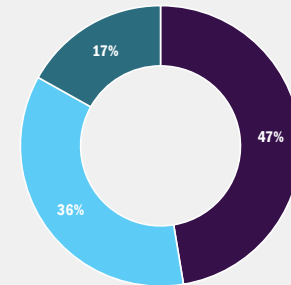
Market opportunity by process



CAGR% (2018-2025)

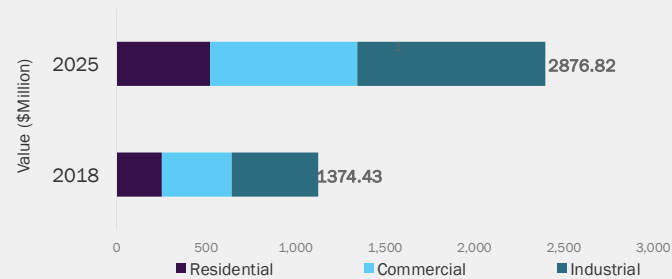
Cooling Condensation	11.34%
Wet Desiccation	11.27%
Solid Desiccation	10.32%

Market Opportunity* *



End-user Segmentation Analysis

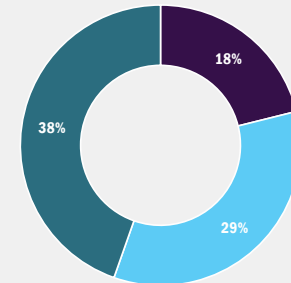
Market opportunity by end-user



CAGR% (2018-2025)

Residential	10.82%
Commercial	11.30%
Industrial	11.68%

Market Opportunity* *



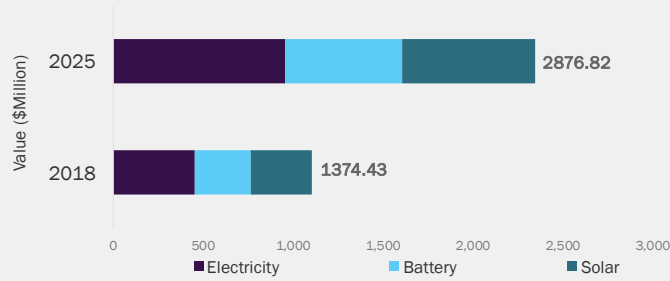
*Market opportunity equates to Incremental growth in volume & value ($\Delta=Y_{2025}-Y_{2017}$)

Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

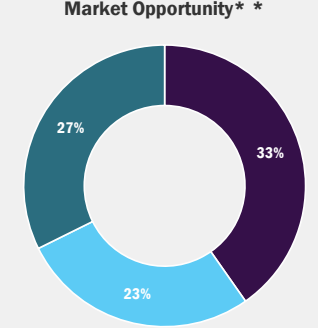
Fig.3 Atmospheric Water Generator (AWG) Market Segmental Outlook

Power Source Segmentation Analysis

Market opportunity by power source



Power Source	CAGR% (2018-2025)
Electricity	11.19%
Battery	11.14%
Solar	11.87%



*Market opportunity equates to Incremental growth in volume & value (Δ=Y2025-Y2017)

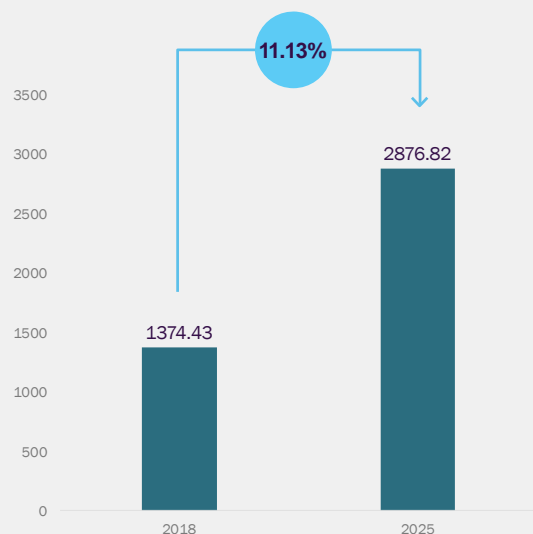
Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

1.3 Competitive Outlook

Fig.4 Atmospheric Water Generator (AWG) Market Competitive Outlook

Market Facts

Market Size



Market Growth Stage

HIGH

Low | Medium | High | Exponential

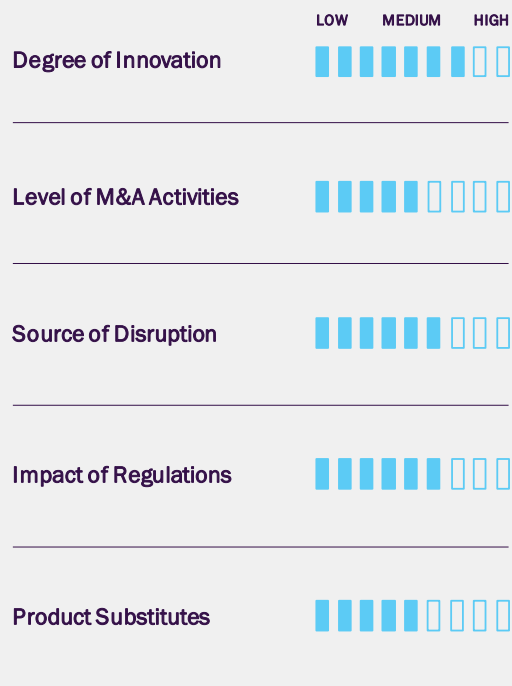
Pace of Market Growth

ACCELERATING

Accelerating | Decelerating

Market Characteristics

Market Attributes



Vendor Preview

Market Participants

Number of Competitors **75 - 100**

Key Vendors Market Share **20 - 25%**

Key Vendors

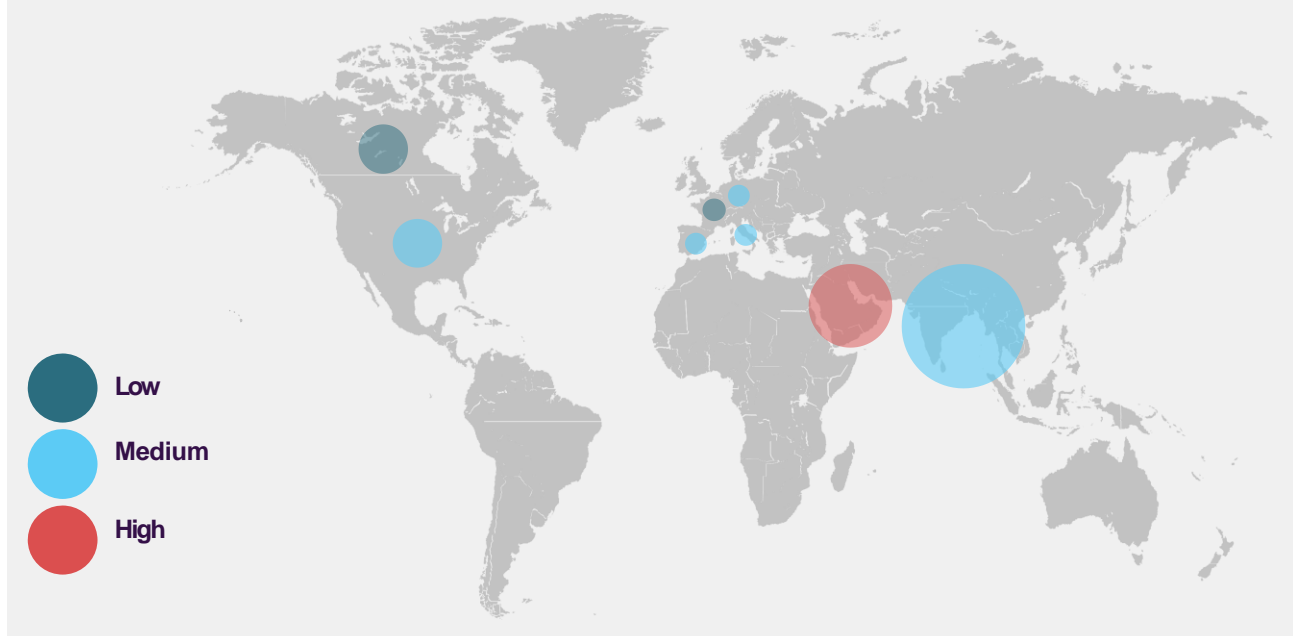
Water-Gen Ltd.
 Saisons Technocom Pvt. Ltd.
 Air2Water LLC
 DewPoint Manufacturing Inc.
 WaterMaker India Pvt. Ltd.
 SkyH2O, Inc.

Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

Atmospheric Water Generator (AWG) Market Variables, Trends & Scope

2.1 Penetration & Growth Prospect Mapping

Fig.5 Penetration & Growth Prospect Mapping



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

The atmospheric water generator (AWG) market has high growth prospect in the water-stressed countries. Market penetration would be highly feasible in these regions. These regions are categorized into three levels of penetration & growth prospect including high, medium, and low. The high category includes the UAE and Saudi Arabia. The medium category includes Mexico, Italy, Spain, India, Japan, China, and Germany. Low category includes the U.S., France, and Portugal.

In 2018, the countries in the high category were more than 70% stressed, medium category countries were 25% to 70% stressed, and low category countries were 10% to 25% stressed. Hence, the demand for atmospheric water generators is expected to increase during the forecasted period.

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2.2 Industry Value Chain Analysis

The value chain of atmospheric water generator (AWG) market has a simple structure. AWGs are produced with the support of raw material suppliers, component suppliers and then the product manufacturers produce them under their respective brand names. The raw material suppliers including Arcelor Mittal, China Hongqiao Group Ltd., aluminum corp. of china, Owens Corning, Saint-Gobain Vetrotex, Shintech Inc., Codelco among others supply raw materials including stainless steel, fiberglass, Aluminum, PVC, and copper to the component suppliers. Using these raw materials, the component suppliers including Air Filters Inc., Sidco Filter Corporation, Dembla Valves Ltd., Dalsons Valves, and Larsen and Toubro among others produce different parts of atmospheric water generator that include air filters, fans, valves, condensers, water filters among others. These components are then supplied to system integrators or the product manufacturers who produce the machines under their brand name to according to the market requirements and positioning. Key manufacturers include Water-Gen Ltd., Saisons Technocom Pvt. Ltd., Air2Water LLC, Island Sky Corporation, Water Technologies International, Inc., DewPoint Manufacturing Inc., WaterMaker India Pvt. Ltd., and SkyH2O, Inc. among others. The AWGs are produced for residential, commercial, and industrial purposes. The product manufacturers produce the product according to their market positioning and requirements.

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2.2.1 RAW MATERIAL TRENDS

The raw materials including stainless steel, aluminum, carbon, PVC, fiberglass, and copper among others are used by the suppliers to produce components, spare parts and accessories for the atmospheric water generators and these parts are compiled by the AWG manufacturers. Any change in price, laws, or regulations regarding the raw materials causes a direct or indirect impact on the suppliers. The manufacturers of atmospheric water generators are also affected due to these changes in the parameters regarding raw materials.

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2.2.2 SALES CHANNEL ANALYSIS

Atmospheric water generator manufacturers constantly strive to increase their market share and create a brand image. In order to achieve this, the manufacturers adopt numerous sales strategies. Manufacturers sell their products with the support of a dedicated sales team, authorized distributors, and rental services. The sales team provides product information, cost details, and technical consulting according to the requirements. Water-Gen Ltd., Island Sky Corporation, Water Technologies International, Inc., and WaterMaker India Pvt. Ltd. have a dedicated sales team that offers technical consulting along with product description.

Saisons Technocom Pvt. Ltd. produce residential, commercial, and industrial atmospheric water generators under the brand AirOWater. It manufactures dewpoint, dewpoint prime, and dewpoint super models to cater to different end-users. It sells its products in India and Bangladesh through its online store which is supported by a dedicated sales team. In addition, three authorized dealers located in Maharashtra, Chennai, and Bangalore distribute the products in India and one authorized dealer located in Dhaka distribute the products in Bangladesh.

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2.2.2.1 LIST OF DISTRIBUTORS

Distributors	Region
Pure Gold Solar	North America
Green Force Electric	North America
Francis Solar	North America
Ecoeffect	North America
Lighthouse Solar	North America
Force Energy Solutions	North America
Premier Tiny Homes Inc	North America
Green Heat	Asia Pacific
Global Powersource	Asia Pacific
Swelect – Singapore	Asia Pacific
Swelect – India	Asia Pacific
PT Selaras Daya Utama	Asia Pacific

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2.3 Technology Overview

2.3.1 TECHNOLOGY TIMELINE

The technology used in atmospheric water generator is constantly evolving owing to increasing water consumption and increasing population. Numerous regions are currently experiencing challenges to fulfill drinking water requirements. Various reports and information provided by WHO and UNESCO suggest an acute shortage of water in the coming decades. Atmospheric water generators are seen as a solution to this problem.

The oldest method of collecting moisture from the air was carried out during the Inca empire. They used fog fences to collect the fog and channel it to cisterns for distribution when required. There is also evidence of air wells to capture the moisture from the air. These methods are said to be completely passive and did not require any external power source to carry out the process.

Most atmospheric water generators used currently are based on the same technology which is used in a dehumidifier. The air containing moisture is passed through a cooling coil which results in condensation of the moisture and is collected in storage. This method is called as cooling condensation and the rate of water generation depends on the moisture, ambient temperature, machine's capacity, and the quantity of air passing through the equipment.

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2.4 Regulatory Framework

Regulatory Body/ Agency		Description
World Health Organization's (WHO)	Guidelines for drinking-water quality (GDWQ)	<ul style="list-style-type: none"> ▶ These regulations ensure that the consumer has access to sustainable, sufficient and safe drinking-water. ▶ Enabling legislation should provide broad powers and scope to related regulations and include public health protection objectives, such as the prevention of waterborne disease and the provision of an adequate supply of drinking-water. ▶ Drinking-water regulations focus on improvements to the provision and safety of drinking-water through a variety of requirements, tools and compliance strategies. Although sanctions are needed within regulations, the principal aim is not to shut down deficient water supplies.
U.S. Federal Laws	NSF/ANSI Standard 53 - Drinking Water Treatment Units - Health Effects	<ul style="list-style-type: none"> ▶ This standard applies to both POU and POE units. The substances covered by this standard include asbestos, cysts (based on the use of microspheres or <i>Cryptosporidium parvum</i> oocysts), barium, cadmium, hexavalent and trivalent chromium, copper, fluoride, lead, mercury, nitrate, nitrite, selenium, radon, turbidity, and total trihalomethanes. Many volatile organic compounds (VOCs), such as synthetic organic compounds (SOCs), chlordane, toxaphene, and polychlorinated biphenyls (PCBs), are also covered.

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2.5 Market Dynamics



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

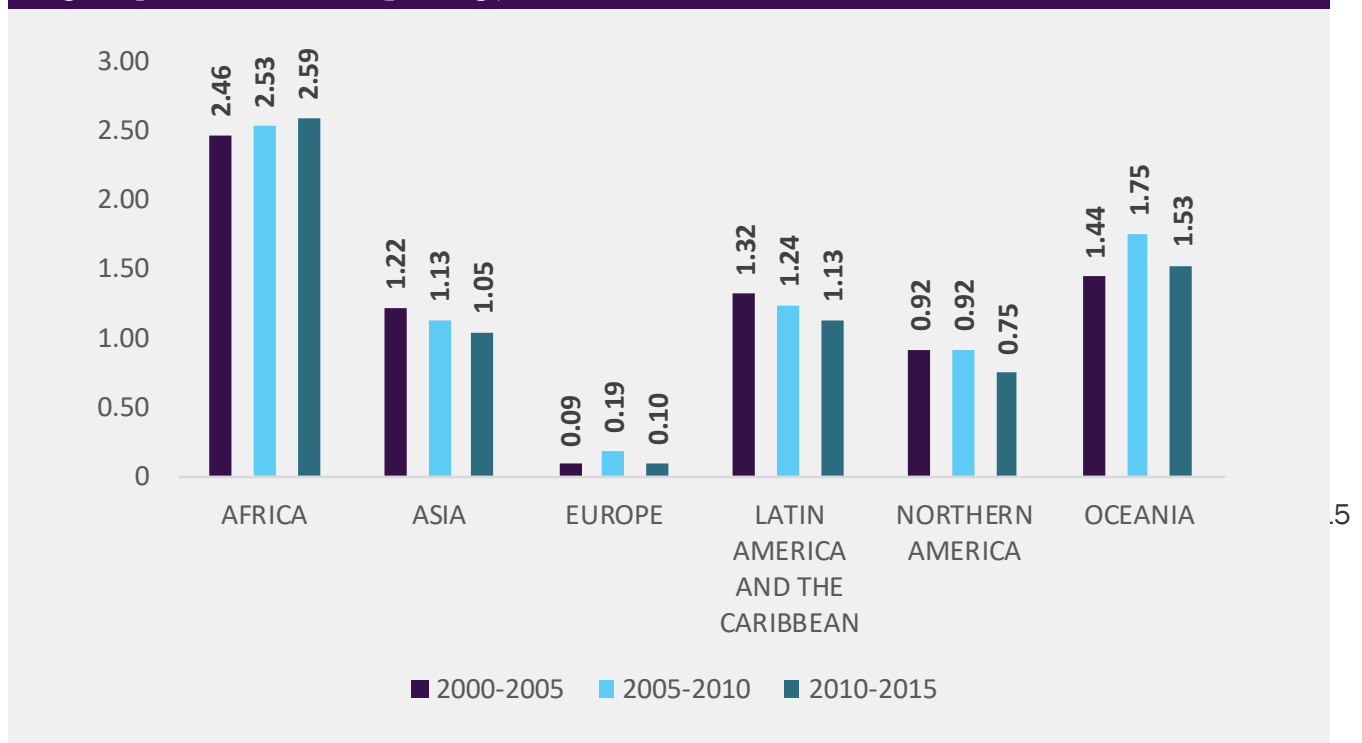
2.5.1 MARKET DRIVERS

2.5.1.1 DEPLETING WATER RESERVES COUPLED WITH INCREASING POPULATION

Water is vital for economic development and fight against poverty. However, water is affected by economic development. The suggested solution is to find a balance between water supply and demand. India had less than a million tube or mechanized wells in 1960 which increased to 19 million in 2000. This illustrates the economic growth of the country and it also resulted in increasing irrigation which caused significant water stress especially in Rajasthan and Maharashtra.

The water resources are limited, and water consumption is increasing by the day. Water is withdrawn at a rate that is higher than the rate of replenishing. According to UNESCO, poor management and no proper sustainable use of water have resulted in overexploitation of 20% of the world's groundwater sources. The lack of sustainable management of water including chemical and pesticides released in water sources coupled with absence wastewater treatment and intensive crop irrigation are witnessed in 90% of the wastewater in developing countries. The water scarcity has shifted the focus towards humidity present in the atmosphere. This is expected to drive the atmospheric water generator market during the forecast period.

Fig.7 Population Growth Rate (percentage)



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

In 2016, agriculture sector consumed 69% of the water, industrial sector consumed 19% of the sector, and households consumed 12% of the water. To meet the demands of the increasing population, the energy and agriculture sectors will have to produce more. It is estimated that by 2050, the agriculture sector will have to produce 60% more food globally and 100% more food in developing countries. Moreover, the growing demand for manufactured goods including food products, computers, machines, electronic goods among others will also result in increased water consumption. Depleting water reserves coupled with increasing population is expected to be the key driver for the atmospheric water generator market.

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2.5.2 MARKET RESTRAINTS

2.5.2.1 HIGH POWER CONSUMPTION

The power consumed by atmospheric water generators (AWGs) is the major restraint of the AWG market. The AWGs are required in regions which are water-stressed or where safe drinking water is not easily available. The cost of power consumed by some of the AWGs is higher than the bottled water. This restrains the consumers to readily adopt the technology. The traditional AWGs, which operated using electricity from burning coal, consumed power that could produce 4 liters of drinking water. Though new and better technologies including cooling condensation, wet desiccation, and solid desiccation have been invented during recent years, high power consumption remains a concern for the consumers. Considering the products offered by key players, the average power consumed by an atmospheric water generator is 1,420 Watts to produce one gallon of safe drinking water. The average price for 1000 gallons of drinking water cost USD 2 in the U.S. whereas an atmospheric water generator consumes an average power worth USD 170.42 to produce 1000 gallons of potable water which is over 85 times. Thus, the high degree of power consumption is expected to restrain the atmospheric water generator market.

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2.5.3 INDUSTRY CHALLENGES

The atmospheric water generator market is expected to grow significantly on account of depleting freshwater reserves, increasing water consumption, and increasing water pollution. Growing agriculture and beverage industries, owing to increasing population and disposable income, are expected to increase water consumption over the forecast period. In 2016, agriculture, industrial, and household sectors accounted for 69%, 19%, and 12% of the global water consumption respectively. According to UN, water crisis will be observed globally by 2050 owing to exponential increase in water consumption.

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2.5.3.1 AWARENESS

Awareness is one of the most important and first step towards adoption of new product or technology. To increase the adoption of atmospheric water generators, the target market must be aware of the water crisis, the product, its technology, and the benefits that come along. Awareness could also be carried out with the support of government campaigns and NGOs. Areas which lack proper drinking water system are easy targets. Numerous government campaigns have already created enough awareness to save the precious natural resource.

2.5.3.2 CLIMATIC CONDITIONS

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2.6 Business Environment Analysis: Atmospheric Water Generator (AWG) Market

2.6.1 INDUSTRY ANALYSIS – PORTER’S

2.6.1.1 BUYER POWER

The buyers of atmospheric water generators (AWG) are present in areas where safe drinking water is not easily available. The major buyers are commercial buildings, offices, industries. These businesses are huge in number and are present everywhere. Water is the most essential requirement for any business and is consumed in large quantities. The cost of one liter of water produced using atmospheric water generator is low as compared to the bottled water. Any business would appreciate decreasing expenses. Hence, it decreases the buyer power to an extent.

In contrast, the high setup cost and research & development required has limited the number of atmospheric water generator manufacturers indicating low bargaining power of the buyers.

Thus, buyers exercise low power in the atmospheric water generator market.

2.6.1.2 SUPPLIER POWER

2.6.1.3 THREAT OF SUBSTITUTION

2.6.1.4 THREAT FROM NEW ENTRANT

2.6.1.5 COMPETITIVE RIVALRY

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2.6.2 PESTEL ANALYSIS

2.6.2.1 POLITICAL LANDSCAPE

Industry players investing in the Middle East and Africa are politically the most unstable regions in the world. Investments in these regions involve a higher degree of risk on account of corruption, poor governance, demographic pressures among others. Changes in the political environment, politically motivated violent damage.

Various government organizations are buyers of atmospheric water generators and political decisions will surely impact the adoption of atmospheric water generators market. The imposition of the use of atmospheric water generators in water-stressed areas for sustainable development and proper management of drinking water would positively impact the atmospheric water generator market.

2.6.2.2 ECONOMIC LANDSCAPE

2.6.2.3 SOCIAL LANDSCAPE

2.6.2.4 TECHNOLOGY LANDSCAPE

2.6.2.5 ENVIRONMENTAL LANDSCAPE

2.6.2.6 LEGAL LANDSCAPE

Upgrade report license to gain access to the complete analysis for the aforementioned section

2.6.3 MAJOR DEALS & STRATEGIC ALLIANCES ANALYSIS

Disasters cause loss of valuable resources and basic amenities are cut-off from the affected population. Drinking water supply is one of the essential requirements that is cut-off in disaster-stricken areas. Watergen Ltd. provides its technology in South Africa to areas that are struck by any disaster and are cut-off from drinking water facilities. This initiative is funded by Ford motor company and is deployed by world vision South Africa aid organization. Watergen provides the GEN-350 model which can produce up to 238 gallons of pure and safe drinking water. It provides aid to over 3,400 households along with dozens of schools and childhood development centers.

Majik Water, a manufacturer of atmospheric water generators from Kenya, installed its pilot atmospheric water generator in February 2019 at The Ark Children's Home located in Thika, Kenya. The children's home suffers from water scarcity and the atmospheric water generator installed by majik water will provide a solution to them by producing over 13 gallons of water every day.

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2.6.3.1 CROWD FUNDING PROJECTS

Uravu Labs, founded in 2017, produced an atmospheric water generator with a production capacity of 66 gallons of drinking water per day. Its Co-Founder, Mr. Swapnil Shrivastav, launched a fundraiser campaign on Dream Wallets and received decent funding support.

In March 2019, The United Abrahamic Family (TAUFI) launched a fundraiser campaign for the construction of atmospheric water generation factory. TAUFI focusses on bringing the atmospheric water generator in a controlled environment that is suitable for water generation from air. The atmospheric water generation factory is expected to generate 5,283 gallons of drinking water per day.

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2.7 Market Entry Strategies

Fig.8 Market Entry Strategies

Startups	Licensing & Partnership	Distribution Agreements
SkyH2O, Inc. Acqua Dall 'Aria Eurosport Active World Corporation Technologies	WatergenUSA partners with NBC25 Partnerships are one of the most commonly used methods to enter a new market. It helps in targeting a particular problem which cannot be resolved by a single entity.	Majority of the companies focus on a strong distribution network by forming agreements with the distributors. The agreements contributes to targeting the audience and gaining the market share.

Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

Atmospheric Water Generator (AWG) Market: Process Estimates & Trend Analysis

3.1 Process Market Snapshot

The cooling condensation segment is expected to grow at the fastest CAGR of 11.34% during the forecast period.

Cooling condensation segment is estimated to touch USD 1,346.89 million by 2025. The cooling condensation process is used in refrigerators and air conditioners. This process is highly researched and well adopted globally. Suitable climatic conditions are expected to drive the cooling condensation segment.

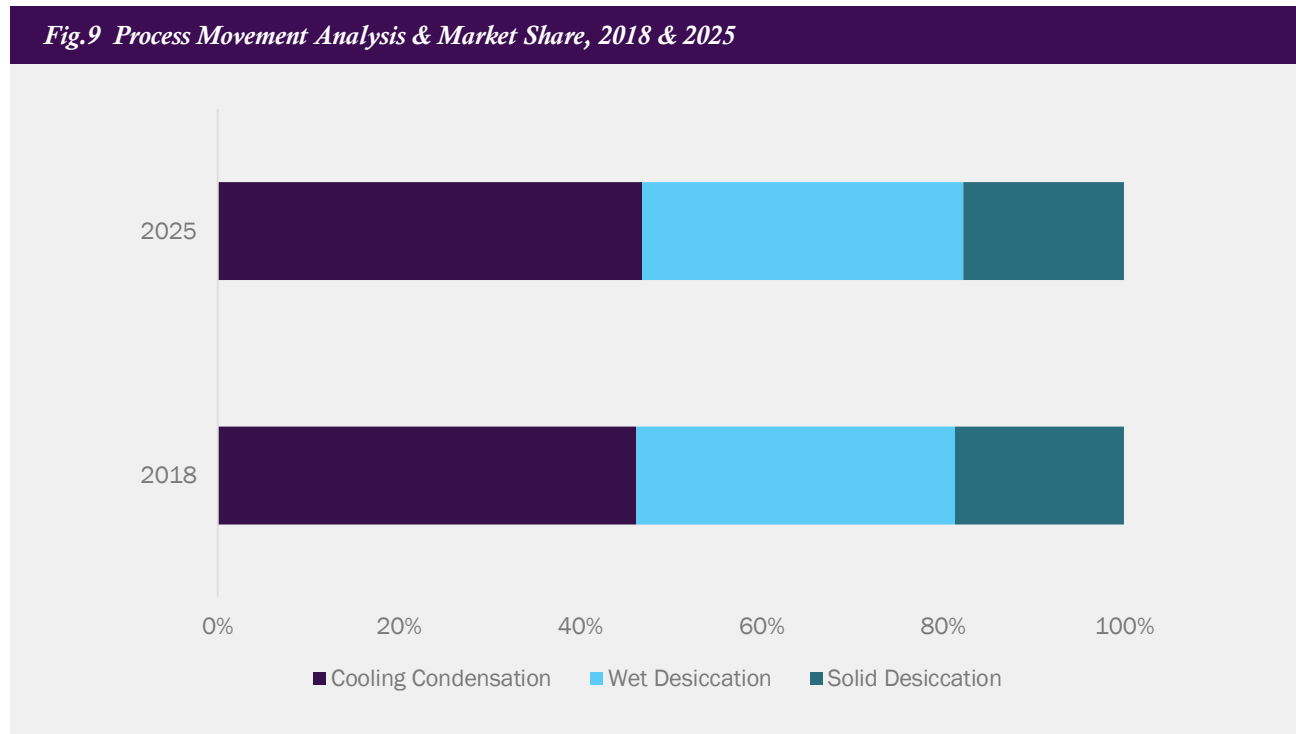
Wet desiccation segment accounted for a market share of 35.12% in 2018 which is expected to increase to 35.44% by 2025.

Wet desiccation segment is anticipated to grow at a significant CAGR of 11.27% during the forecast period and reach USD 1,019.51 million in 2025. Along with suitable climatic conditions, availability of fluid desiccants is also a key driver of the wet desiccation segment. Wet desiccation requires fluid desiccants including silica and calcium chloride. Fluid desiccants are abundantly available in numerous countries including the U.S., Italy, France, Germany, UK, Spain, China, India, and Saudi Arabia.

Solid desiccation segment is also expected to grow significantly during the forecast period owing to depleting water scarcity, water pollution, and increasing water requirements owing to industrialization and increasing population.

Solid desiccation segment is anticipated to grow at a CAGR of 10.32% during the forecast period to reach USD 510.42 million in 2025 from USD 256.63 million in 2018. Availability of solid desiccants is a key driver of the solid desiccation segment. Solid desiccation requires solid desiccants including gypsum and zeolites. Solid desiccants are abundantly available in numerous countries including China, South Korea, Japan, U.S., Spain, Mexico, Russia, Italy, India, Australia, and Brazil.

3.2 Process Movement Analysis & Market Share, 2018 & 2025

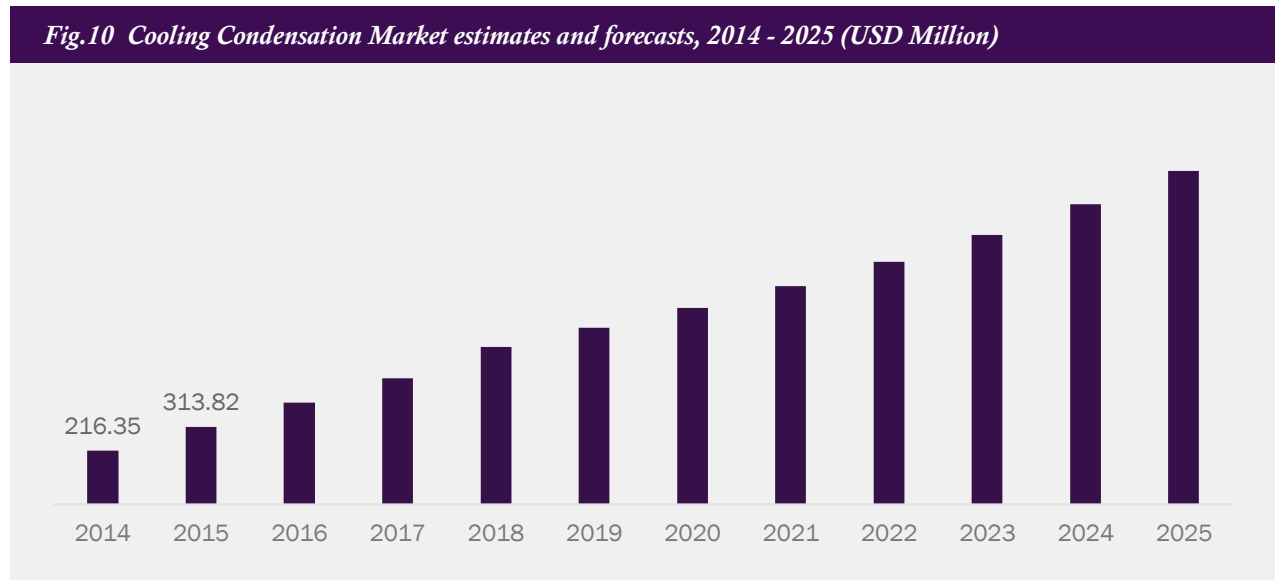


Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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3.3 Cooling Condensation

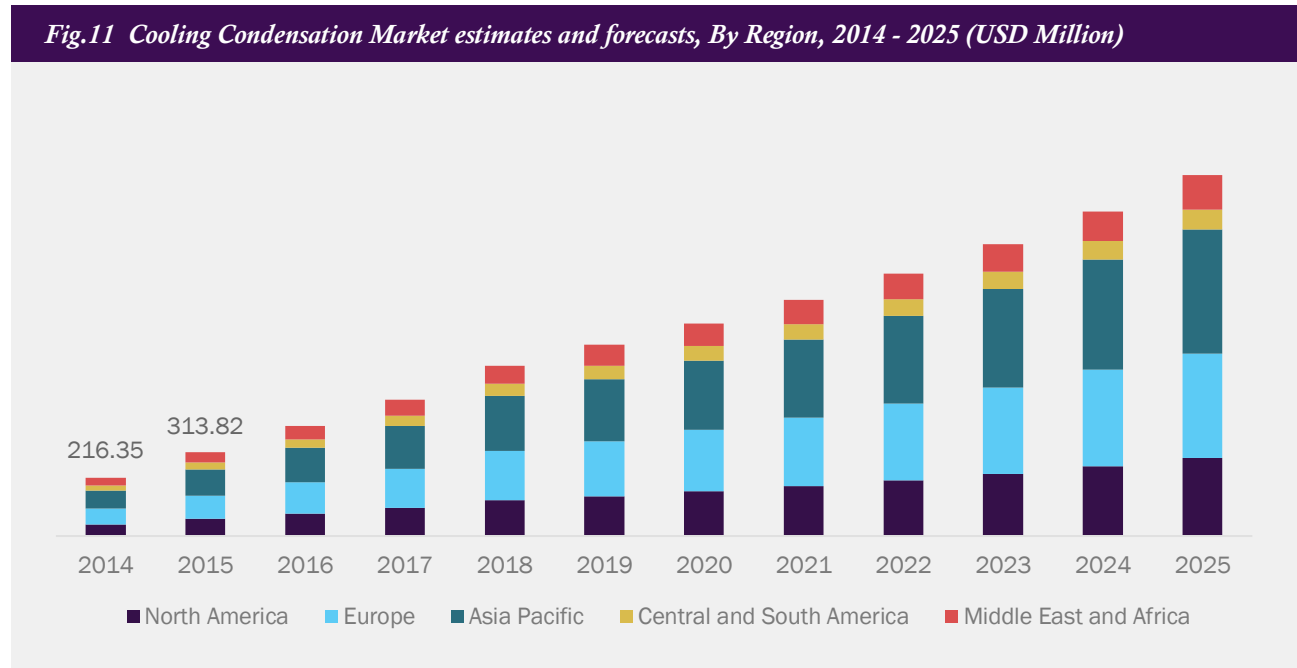
3.3.1 ATMOSPHERIC WATER GENERATOR (AWG) MARKET ESTIMATES AND FORECASTS, IN COOLING CONDENSATION, 2014–2025 (USD MILLION)



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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3.3.2 ATMOSPHERIC WATER GENERATOR (AWG) MARKET ESTIMATES AND FORECASTS, IN COOLING CONDENSATION, BY REGION, 2014–2025 (USD MILLION)



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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3.4 Wet Desiccation

3.5 Solid Desiccation

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Atmospheric Water Generator (AWG) Market: End-Use Estimates & Trend Analysis

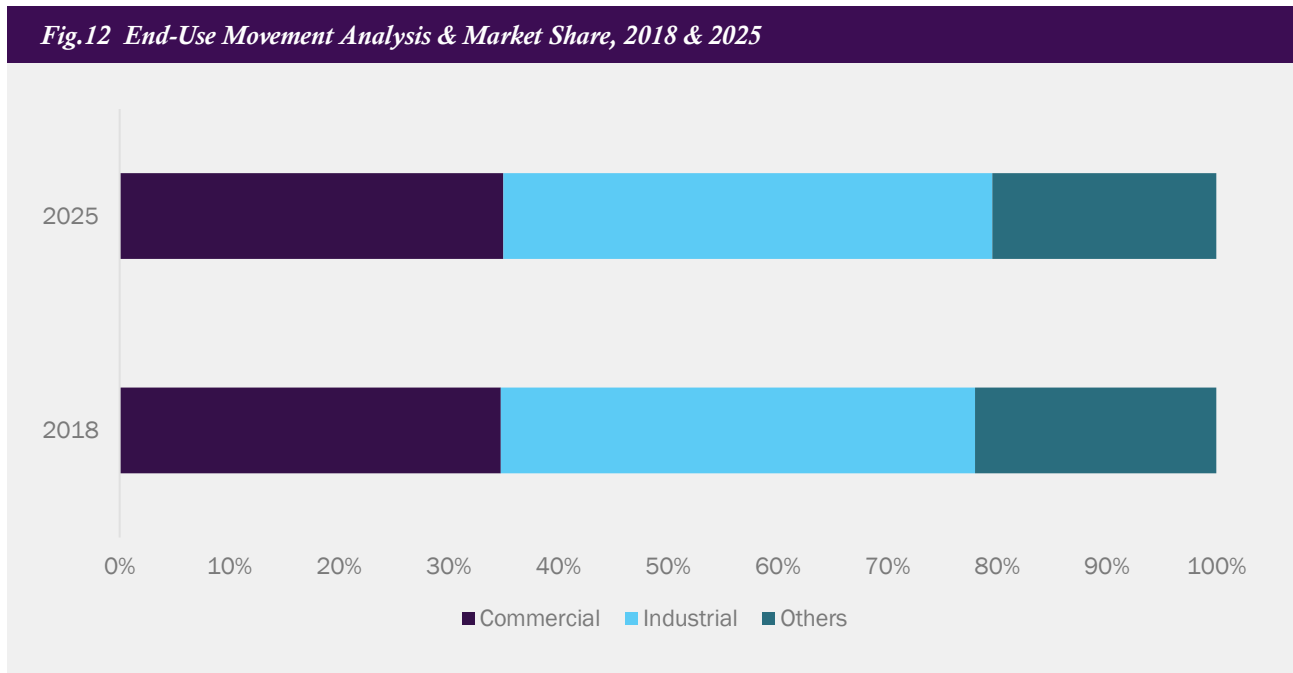
4.1 End-Use Market Snapshot

The residential segment is expected to grow at a CAGR of 10.82% during the forecast period. The **residential** segment includes small production capacity atmospheric water generators which can produce drinking water for a family. Increasing disposable income and water scarcity are the key drivers for this segment.

Commercial segment accounted for a market share of 28.33% in 2018 which is expected to increase to 28.64% by 2025. **Commercial** segment includes moderate to high production capacity atmospheric water generators. These generators are installed at numerous places including schools, hospitals, restaurants, and commercial buildings. The cost of water produced by atmospheric water generator is lower when compared to the cost of water cans which is expected to drive the commercial segment.

Industrial segment is expected to grow at the fastest CAGR of 11.68% during the forecast period owing to lack of proper drinking water systems. **The industrial** segment is expected to grow owing to chemical waste from industries coupled with lack of proper drinking water systems is expected to boost the industrial segment. Industrial segment includes high to very high production capacity atmospheric water generators. These are used in numerous industries including manufacturing, beverage, bottling plants, and thermal power plants.

4.2 End-use Movement Analysis & Market Share, 2018 & 2025

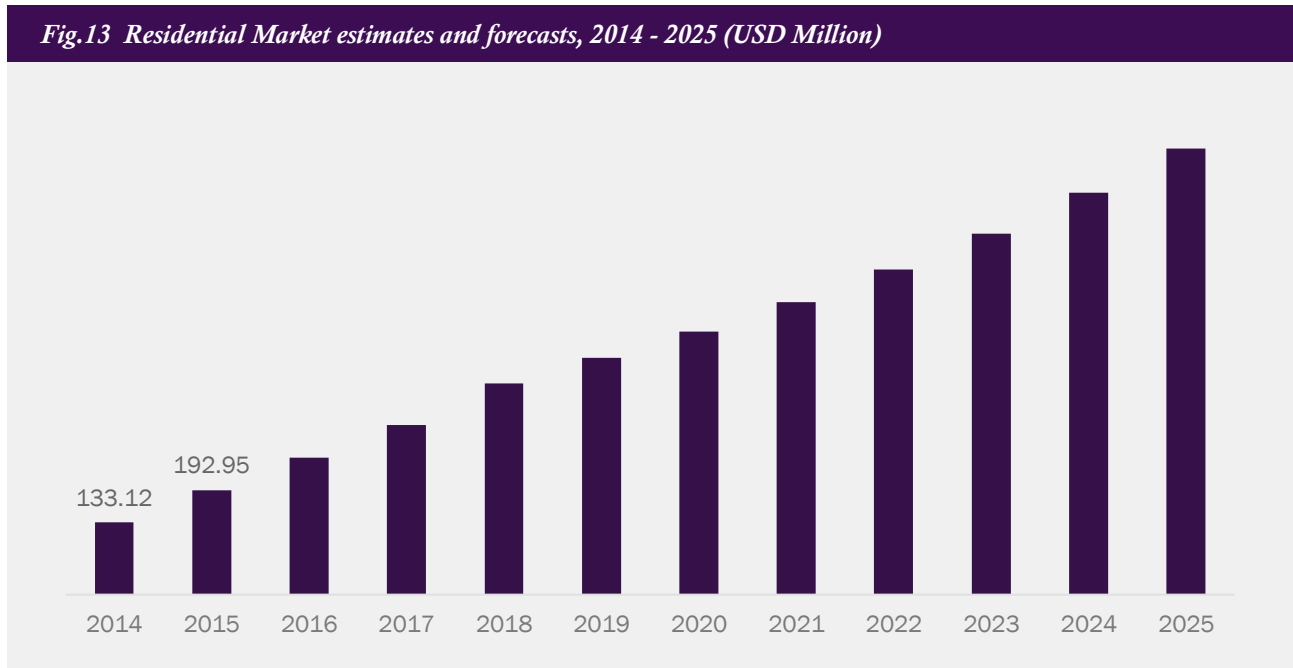


Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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4.3 Residential

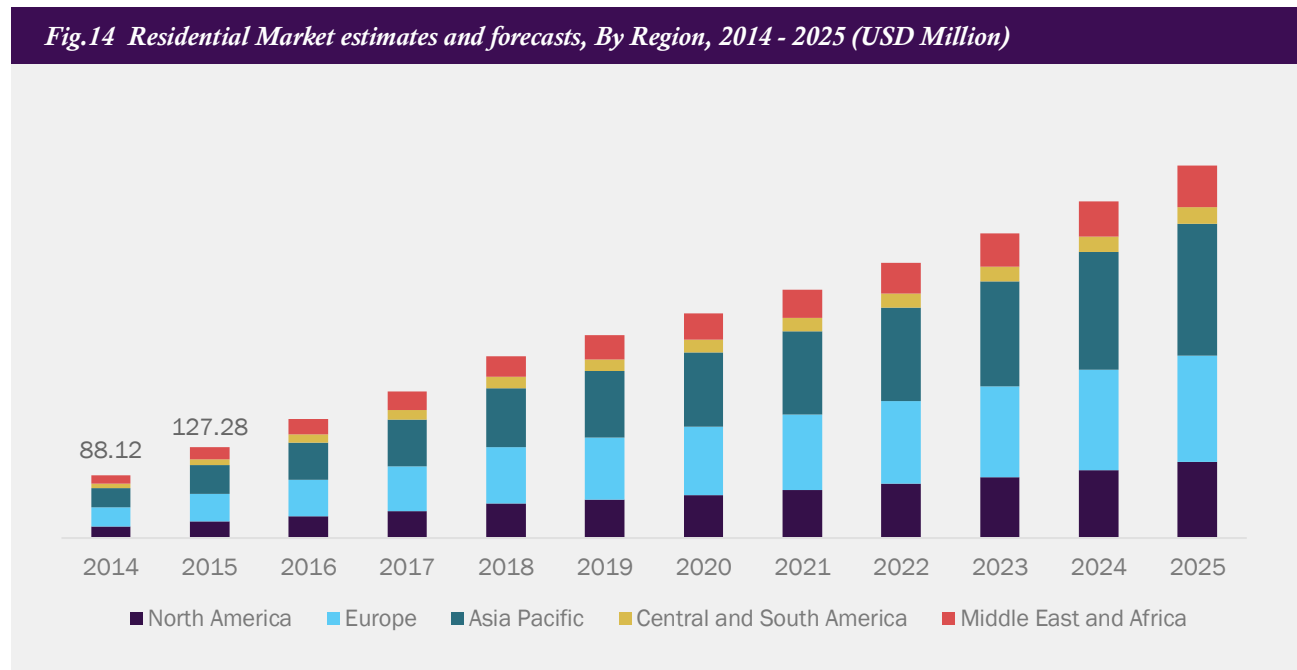
4.3.1 ATMOSPHERIC WATER GENERATOR (AWG) MARKET ESTIMATES AND FORECASTS, IN RESIDENTIAL, 2014–2025 (USD MILLION)



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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4.3.2 ATMOSPHERIC WATER GENERATOR (AWG) MARKET ESTIMATES AND FORECASTS, IN RESIDENTIAL, BY REGION, 2014–2025 (USD MILLION)



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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4.4 Commercial

4.5 Industrial

4.6 Others

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Atmospheric Water Generator (AWG) Market: Power Source Estimates & Trend Analysis

5.1 Power Source Market Snapshot

The electricity segment is expected to grow at a CAGR of 11.19% during the forecast period.

The **electricity** segment includes atmospheric water generators that use electricity as their primary source of energy. These atmospheric water generators are fixed and not portable. These are more suitable for places where electricity is easily and continuously available.

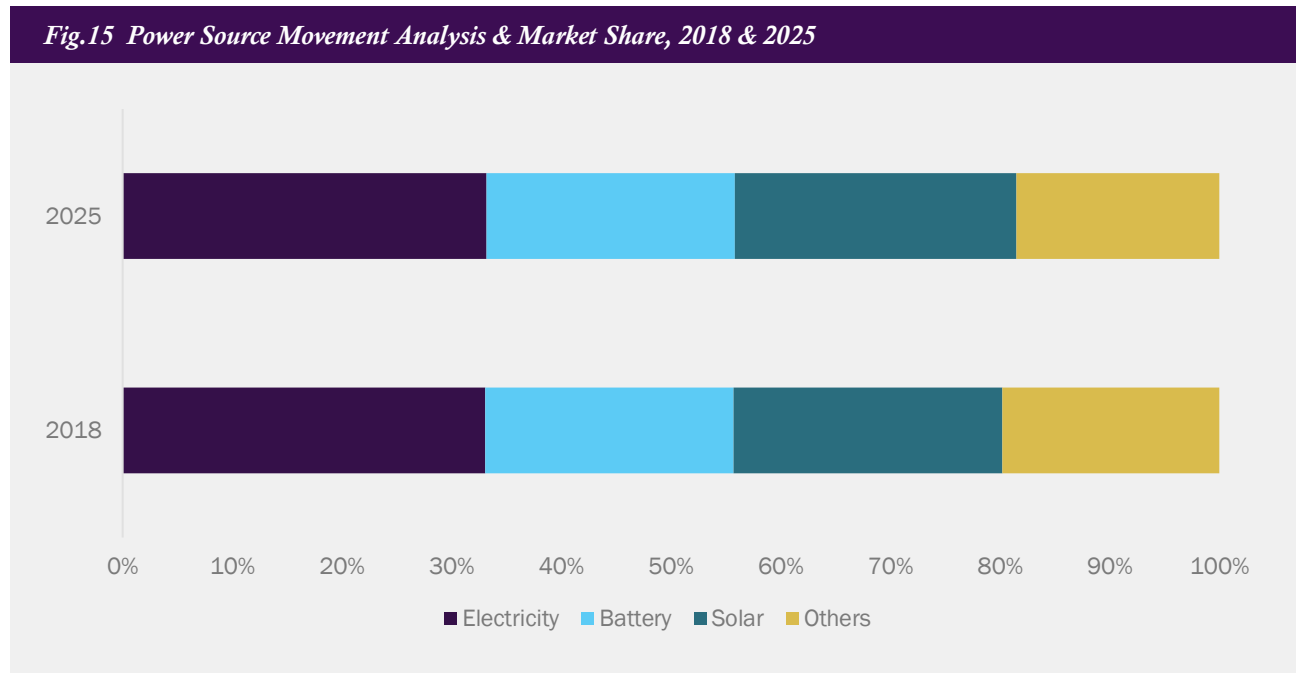
Battery segment accounted for a market share of 22.65% in 2018 and is expected to grow owing to the flexible nature of these atmospheric water generators.

The **Battery** segment includes atmospheric water generators that use stored electricity as their primary source of energy. These generators are used at places where electricity is not easily available.

Solar segment is expected to grow at the fastest CAGR of 11.87% during the forecast period owing to increasing investments in solar power projects.

The **Solar segment** includes atmospheric water generators that use solar power as their primary source of energy. The solar energy is a renewable resource and increasing investments in solar power projects have resulted in increasing adoption of solar-powered appliances. This is expected to drive the market for solar-based atmospheric water generators.

5.2 Power Source Movement Analysis & Market Share, 2018 & 2025

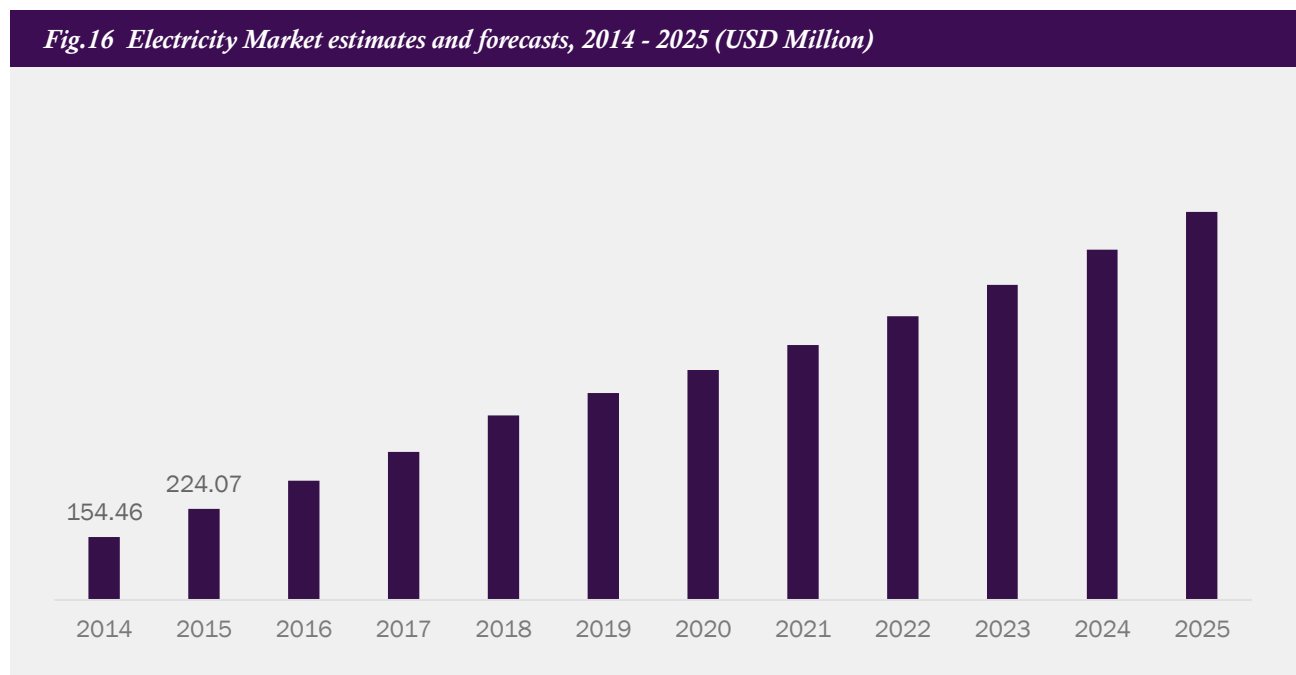


Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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5.3 Electricity

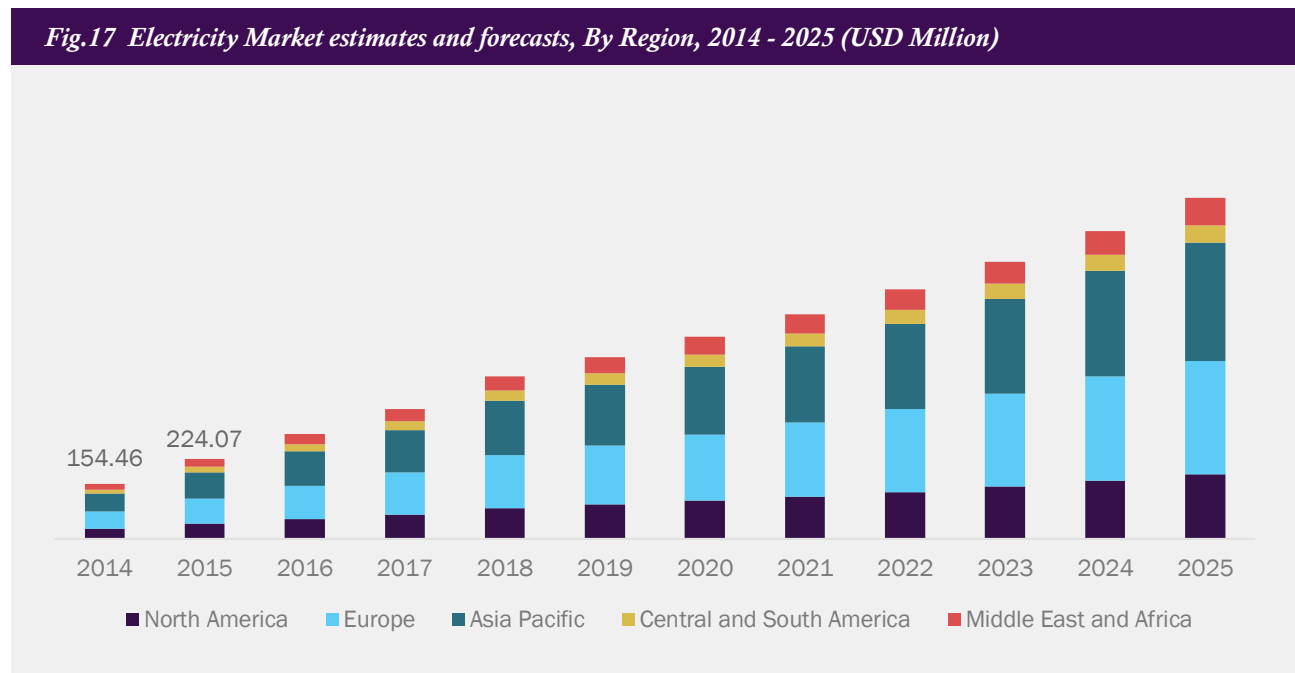
5.3.1 ATMOSPHERIC WATER GENERATOR (AWG) MARKET ESTIMATES AND FORECASTS, IN ELECTRICITY, 2014-2025 (USD MILLION)



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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5.3.2 ATMOSPHERIC WATER GENERATOR (AWG) MARKET ESTIMATES AND FORECASTS, IN ELECTRICITY, BY REGION, 2014–2025 (USD MILLION)



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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5.4 Battery

5.5 Solar

5.6 Others

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Atmospheric Water Generator (AWG) Market: Regional Estimates & Trend Analysis

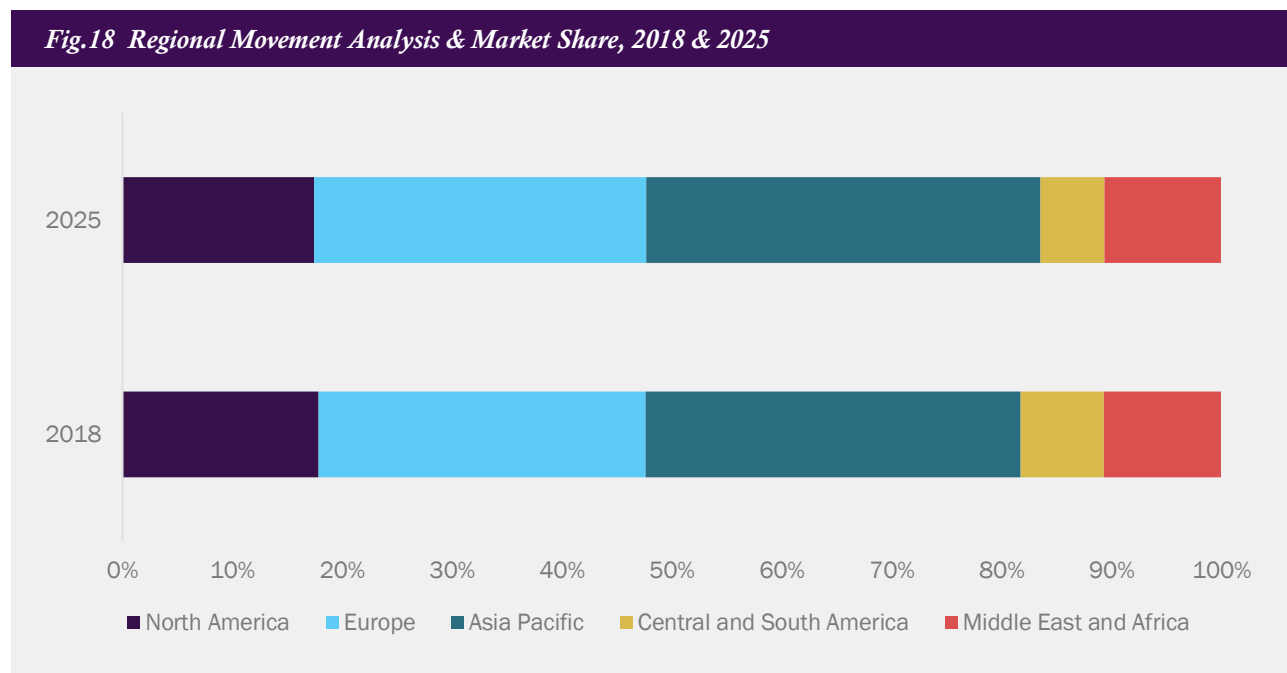
6.1 Regional Market Snapshot

Asia Pacific market is expected to grow at the fastest CAGR of 11.94% during the forecast period. **Asia Pacific** market is expected to grow owing to rapid industrialization is expected to further boost the demand for atmospheric water generators.

Europe market accounted for the second highest market share of 29.79% in 2018 and is expected to grow owing to increasing water stress. **Europe** market is expected to grow at a significant CAGR of 11.37% over the forecast period. Suitable climatic conditions and water scarcity are the key drivers of Europe atmospheric water generator market. High water requirements by manufacturing industries especially the beverage industry is expected to further boost the demand.

North America market is expected to grow at a CAGR of 10.76% during the forecast period owing to high disposable income coupled with depleting waster reserves. **North America** market is expected to grow on account of increasing disposable income, suitable climatic conditions, especially in the U.S. and Mexico, are expected to drive the market.

6.2 Regional Movement Analysis & Market Share, By Region, 2014 to 2025



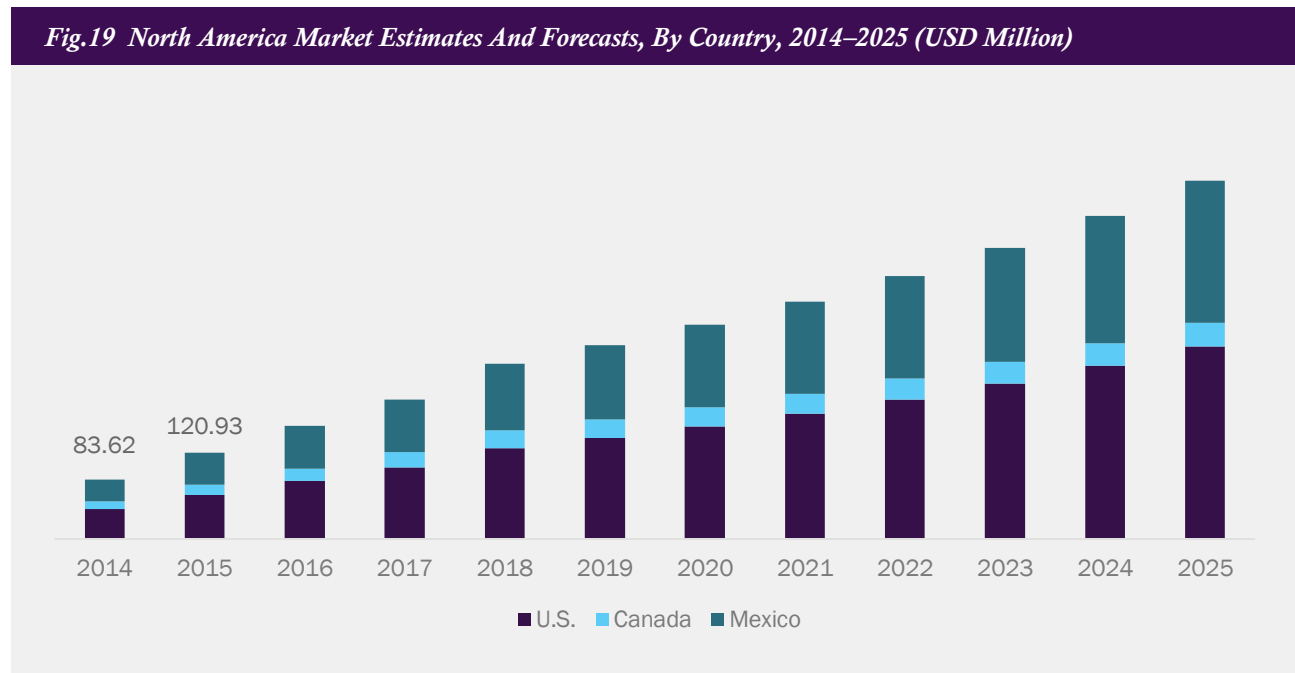
Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

Based on region, the atmospheric water generator (AWG) market is bifurcated into North America, Europe, Asia Pacific, Central & South America, and Middle East & Africa. Asia Pacific region emerged as the largest market owing to suitable climatic conditions and high population.

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6.3 North America

6.3.1 NORTH AMERICA ATMOSPHERIC WATER GENERATOR (AWG) MARKET ESTIMATES AND FORECASTS, BY COUNTRY, 2014–2025 (USD MILLION)



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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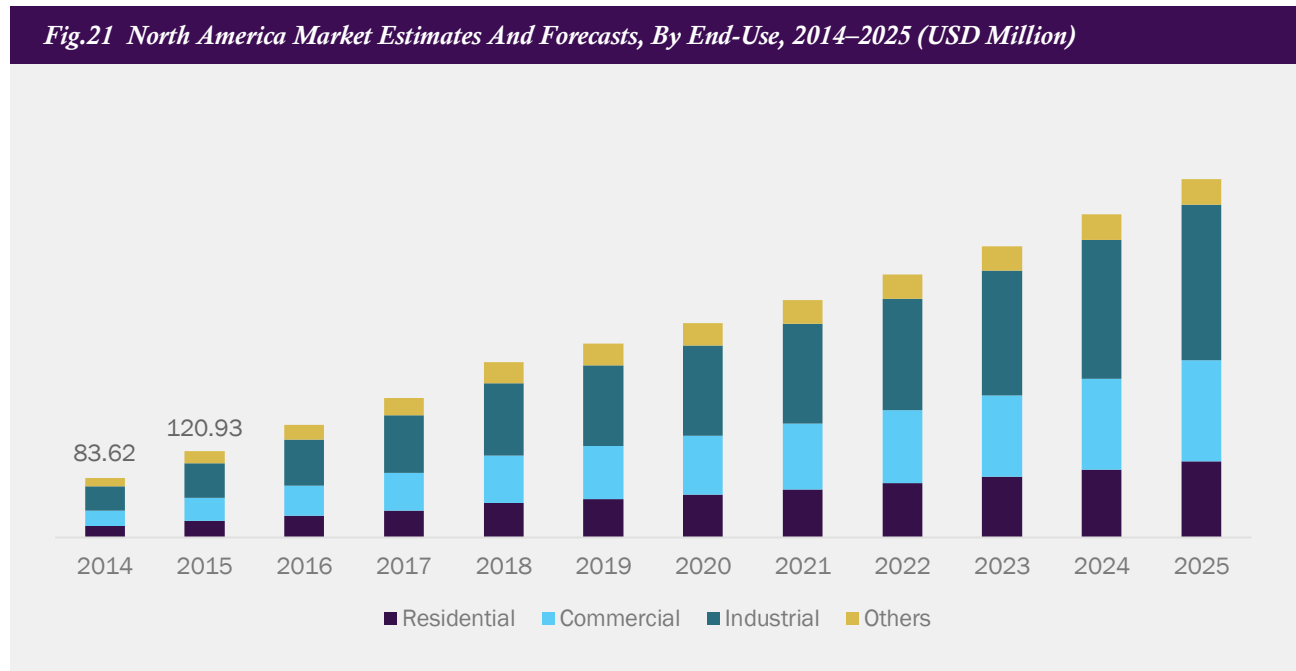
6.3.2 NORTH AMERICA ATMOSPHERIC WATER GENERATOR (AWG) MARKET ESTIMATES AND FORECASTS, BY PROCESS, 2014–2025 (USD MILLION)



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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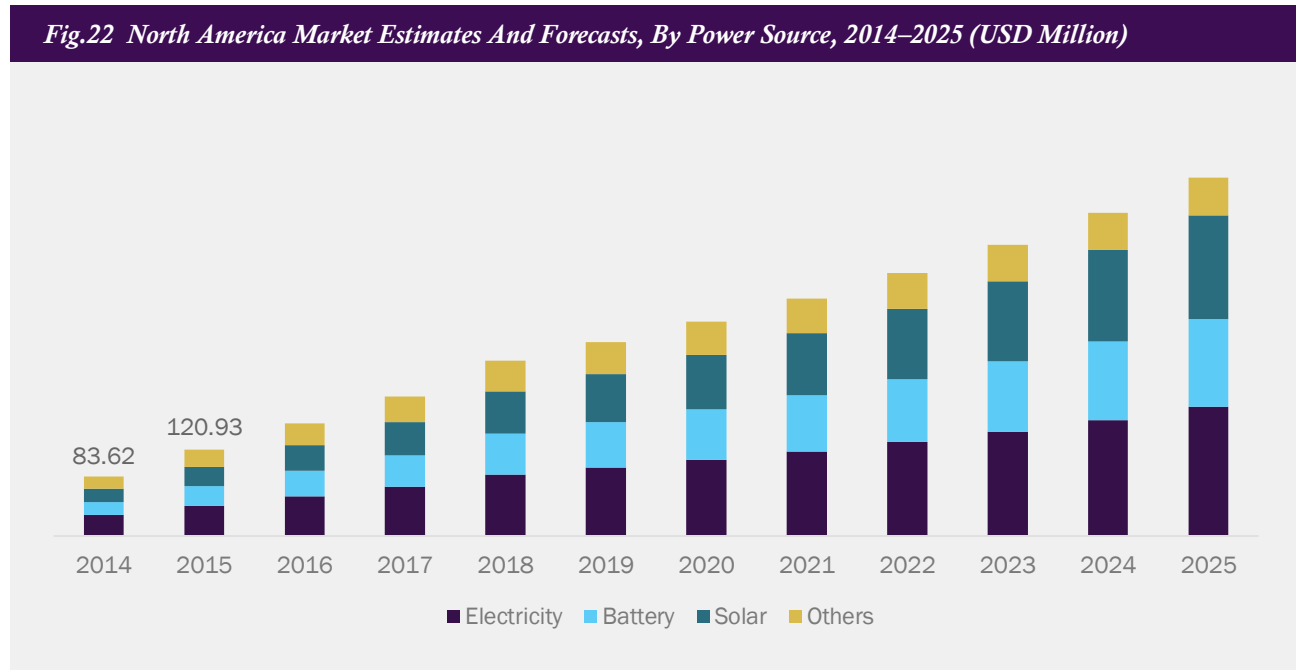
6.3.3 NORTH AMERICA ATMOSPHERIC WATER GENERATOR (AWG) MARKET ESTIMATES AND FORECASTS, BY END-USE, 2014–2025 (USD MILLION)



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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6.3.4 NORTH AMERICA ATMOSPHERIC WATER GENERATOR (AWG) MARKET ESTIMATES AND FORECASTS, BY POWER SOURCE, 2014–2025 (USD MILLION)



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

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6.3.5 U.S.

6.3.6 CANADA

6.3.7 MEXICO

6.4 Europe

6.4.1 UK

6.4.2 GERMANY

6.4.3 FRANCE

6.4.4 SPAIN

6.4.5 RUSSIA

6.4.6 ITALY

6.5 Asia Pacific

6.5.1 CHINA

6.5.2 JAPAN

6.5.3 INDIA

6.5.4 AUSTRALIA

6.5.5 SOUTH KOREA

6.6 Central & South America

6.6.1 BRAZIL

6.7 Middle East & Africa

6.7.1 SAUDI ARABIA

6.7.2 UAE

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Atmospheric Water Generator (AWG) Market– Competitive Analysis

7.1 Key global players & recent developments & their impact on the industry

It was estimated that 2.1 billion people were lacking access to safe drinking water services in 2015 and 4.5 billion people were lacking access to safely managed sanitation services. Also, inadequate water and sanitation cause 1.7 million children deaths every year along with a loss of 443 million schooldays every year owing to water related diseases. In 2018, drought resulted in economic damage of USD 5.4 billion and it affected 55 million people resulting in 1,100 deaths. By 2025, 50% of the world's population will be living in water-stressed areas. The above-mentioned information coupled with increasing population and water consumption will result in an acute shortage of safe drinking water in the future.

AWGs are new technology-based devices that can convert humidity in the air into potable water. These devices use cooling condensation, solid desiccation, or wet desiccation to produce water from thin air. The Earth's atmosphere consists of approximately 3,434.24 trillion gallons of water in the form of humidity that can be extracted. AWGs can be used for residential, industrial, and commercial purposes. These devices can be used at numerous places including water scarce areas, industries where safe drinking water is not easily available, and during natural calamities where water supply is cut off.

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7.2 Key Company/Competition Categorization (Key innovators, Market leaders, Market Challenger, Emerging players)

Fig.23 Key Company/Competition Categorization

	Revenue	Geographical Presence	Product Portfolio
Mature Players	Water-Gen Ltd.	▶ Generated high revenue in 2018 when compared to other competitors	▶ Have a worldwide geographical presence except Saisons Technocom Pvt. Ltd. which has operations only in India and Bangladesh
	Saisons Technocom Pvt. Ltd.	▶ These players are oldest players in the atmospheric water generator market except Saisons Technocom Pvt. Ltd. However, it dominates owing to its high revenue.	▶ Have a vast product portfolio when compared to their competitors
	Air2Water LLC		▶ Offers residential, commercial, and industrial atmospheric water generators
	Island Sky Corporation		
Emerging Players	SkyH2O, Inc.	▶ Generated low revenue in 2018 when compared to other competitors	▶ Have a shallow product line as compared to mature players
	Acqua Dall 'Aria	▶ These players have recently entered the atmospheric water generator market	▶ Focus on atmospheric water generators for either of the three applications including residential, commercial, and industrial
	Eurosport Active World		
	Corporation Technologies		

Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

7.3 Vendor Landscape

Company	Product	Features/Applications
Saisons Technocom Pvt. Ltd.	Dewpoint	<ul style="list-style-type: none"> ▶ It is a portable water generator suitable for residential purposes and small offices. ▶ Consists of a four-stage filtration system. ▶ Production capacity- 6.6 gallons per day. ▶ Storage capacity- 6.34 gallons. ▶ Power required- 500 watts.
	Dewpoint Prime	<ul style="list-style-type: none"> ▶ It is designed to save space and is suitable for homes, retail stores, and offices. ▶ Consists of a four-stage filtration system. ▶ Specially designed for air-conditioned environments as one part is installed outdoors. ▶ Production capacity- 6.6 gallons per day. ▶ Storage capacity- 6.34 gallons. ▶ Power required- 500 watts.
	Dewpoint Super	<ul style="list-style-type: none"> ▶ It is suitable for industrial and commercial purposes. ▶ Consists of a four-stage filtration system. ▶ Production capacity- 26.41 gallons per day. ▶ Storage capacity- 22.45 gallons. ▶ Power required- 1500 watts.
	Dewpoint Mega	<ul style="list-style-type: none"> ▶ It is suitable for industrial and commercial purposes. ▶ Consists of a four-stage filtration system. ▶ Production capacity- 132.08 gallons per day.
DewPoint Manufacturing Inc.	T40	<ul style="list-style-type: none"> ▶ Production Capacity- 8.5 gallons per day ▶ Operating conditions- 80 °F at 85% RH ▶ Average normal operating load: 550 Watts ▶ Maximum peak Load- 750 Watts

		<ul style="list-style-type: none"> ▶ It consists of numerous features including Illuminated Display, Humidity Sensor & Display, Water Level Indicators, and Quick-Change Filters.
	<p>3000 Gal Atmospheric Water Generator</p>	<ul style="list-style-type: none"> ▶ Production Capacity- 3,000 gallons per day ▶ Operating conditions- 80 °F at 85% RH ▶ It consists of 5-stage filtration process. ▶ The drain pan is made from stainless steel and it consists of HEPA / UV Sterilizer air filters, Custom Design Control Panel.
WaterMaker (India) Pvt. Ltd.	<p><i>Upgrade report license to gain access to the complete analysis.</i></p>	<p><i>Upgrade report license to gain access to the complete analysis.</i></p>
Island Sky Corporation		
Atlantis Solar		
Air2Water LLC		
Water-Gen Ltd.		
Acqua Dall 'Aria		
Water Technologies International, Inc.		
SkyH2O, Inc.		
Eurosport Active World Corporation (EAWC) Technologies		

7.3.1 KEY CUSTOMERS

AWGs have a wide range of residential, commercial, and industrial applications. Residential applications including homes, communities, luxury, child care, rural homes among others require low to moderate production of water. Commercial spaces require a medium production of water. These applications include offices, government authorities, hospitality, public use, schools, disaster relief among others. Industrial spaces require a high production of water to cater to a very large group. These applications include mining sectors, wildlife, agriculture among other industries where safe drinking water is not easily available. Numerous market players including Larsen & Toubro, Hero, Godrej, Escon, Calyx Pharma, Emerson among others have installed AWGs.

7.4 Public Companies

7.4.1 COMPANY MARKET POSITION ANALYSIS

Company	Parameters		
	Revenue	Geographical Presence	Product Portfolio
Water Technologies International, Inc.			

High	➔	Moderate	➔	Low
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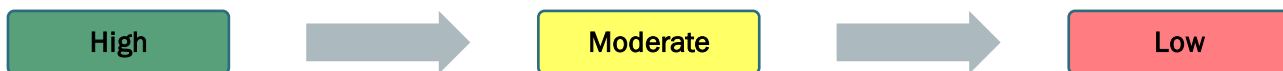
7.5 Private Companies

7.5.1 LIST OF KEY EMERGING COMPANIES/TECHNOLOGY DISRUPTORS/INNOVATORS

Company	Geographical Presence	Key Services Offered
SkyH2O, Inc.	Worldwide	Residential, commercial, and industrial AWGs
<p><i>Upgrade report license to gain access to the complete analysis.</i></p>		

7.5.2 COMPANY MARKET POSITION ANALYSIS

Company	Parameters		
	Revenue	Geographical Presence	Product Portfolio
Water-Gen Ltd.			
Saisons Technocom Pvt. Ltd.			
<p><i>Upgrade report license to gain access to the complete analysis.</i></p>			



7.6 Competitive Dashboard Analysis

The competition among the market players is analyzed based on five parameters including regional expansion, mergers & acquisitions, project setups, patents, and product portfolio. The parameters are arranged in an order of impact from low to high. The regional expansion creates the highest impact on competitive edge whereas product portfolio creates the lowest impact. The companies that have an edge in regional expansion include Water-Gen Ltd., Air2Water LLC, Island Sky Corporation, and Water Technologies International, Inc. Water Technologies International, Inc. has a competitive edge over its competitors in mergers & acquisitions whereas WaterMaker (India) Pvt. Ltd. and Water-Gen Ltd. respectively has a competitive edge over others in project setups. Island Sky Corporation, Air2Water LLC, and Water-Gen Ltd. maintain their position in the market with the support of patents and Air2Water LLC, Water Technologies International, Inc., Island Sky Corporation, and WaterMaker India Pvt. Ltd. have a strong portfolio when compared to their competitors.

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7.6.1 MARKET DIFFERENTIATORS

AWGs are not adopted easily owing to their high-power consumption. Average consumption is calculated to be 650 to 850 Wh to produce one liter of water. However, Water-Gen Ltd. has produced a technology that produces safe drinking water consuming 250 Wh to produce one liter of water. This technology, if successfully applied to commercial AWGs, it will create a positive impact on the water industry.

Company Profile

8.1 PlanetsWater Corporation

8.1.1 COMPANY OVERVIEW

PlanetsWater Corporation, headquartered in Port Douglas, Isle of Man, UK, is a manufacturer and distributor of residential, commercial, and industrial atmospheric water generators. The company offers industrial atmospheric water generators having a capacity of up to 2,641 gallons per day, as well as residential atmospheric water generators having a capacity of up to 27 gallons per day that are suitable for homes and offices.

The atmospheric water generators produced by PlanetsWater corporation can provide hot & cold drinking water that is free of contaminants, viruses, and bacteria. These atmospheric water generators are equipped with water storage tanks and can also act as air purifiers and dehumidifiers for the environment.

The company focuses on expanding its business with the support of its distributors. The company offers a master distributor license that provides lower prices to the distributor. In addition, the distributor can further sell distributorships to third parties in other regions. The company also sells its products worldwide through its online store.

Note: PlanetsWater corporation is a privately held company and, thus, does not declare its financial data.

8.1.2 PRODUCT BENCHMARKING

End-use	Product	Features/Applications
Residential & Commercial AWGs	PW HR 15L	<ul style="list-style-type: none"> ▶ Production Capacity- 3.96 gallons per day ▶ Storage Capacity- 2.32 gallons ▶ Supply hot & cold drinking water ▶ LCD touch screen control panel ▶ Shanghai Hitachi compressor
	PW HR 30L	<ul style="list-style-type: none"> ▶ Production Capacity- 7.92 gallons per day ▶ Storage Capacity- 3.30 gallons

		<ul style="list-style-type: none"> ▶ Supply hot & cold drinking water ▶ LCD touch screen control panel ▶ Samsung compressor
	PW LQ 20L	<ul style="list-style-type: none"> ▶ Production Capacity- 5.28 gallons per day ▶ Supply hot & cold drinking water ▶ LCD touch screen control panel ▶ 3 phase protection compressor- 3 minutes delay protection, overheat, and overload
	PW LQ 45L	<ul style="list-style-type: none"> ▶ Production Capacity- 11.88 gallons per day ▶ Supply hot & cold drinking water ▶ LCD touch screen control panel ▶ Filter system- PP+CTO+RO+T33+UV
Industrial AWGs	PW HR-100	<ul style="list-style-type: none"> ▶ Production Capacity- 26.41 to 2641.72 gallons per day ▶ Working condition temperature- 15-40°C ▶ Working condition relative humidity- 35-95% ▶ These AWGs use fan cooling as the defrost method.
	PW HR-200	
	PW HR-250	
	PW HR-500	
	PW HR-1500	
	PW HR-3000 Water-tank: 1200L	
	PW HR-5000 Water-tank: 1300L	
	PW 10000	
	Water-tank:2600L	

8.1.3 RECENT DEVELOPMENTS

- ▶ **PlanetsWater Corporation** is focusing on spreading awareness and offering good quality products at lower prices.
- ▶ The company aims to expand its local distributors network in order to reduce costs. For example, it costs over USD 500 to airfreight an AWG 30L whereas only USD 9-15 to ship via sea.

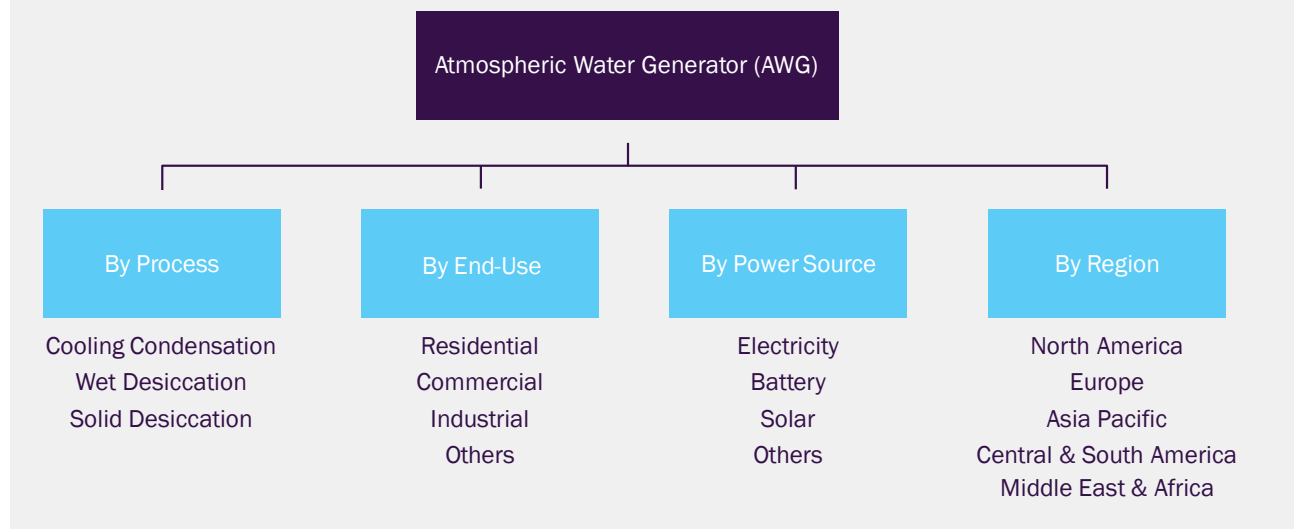
- 8.2 Saisons Technocom Pvt. Ltd.**
- 8.3 DewPoint Manufacturing Inc.**
- 8.4 WaterMaker (India) Pvt. Ltd.**
- 8.5 Island Sky Corporation**
- 8.6 Atlantis Solar and Wind LLC**
- 8.7 Air2Water LLC**
- 8.8 Water-Gen Ltd.**
- 8.9 Acqua Dall 'Aria**
- 8.10 Water Technologies International, Inc.**
- 8.11 SkyH2O, Inc.**
- 8.12 Eurosport Active World Corporation (EAWC)Technologies**

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Methodology and Scope

9.1 Market Definition, Segmentation & Scope

Fig.24 Atmospheric Water Generator Market Segmentation



Source: WHO, UNESCO, UNICEF, EPA, IEEE, UN, FAO, WRI, Hoovers, Web Journals, Company Websites, Company Annual Reports, GVR

We have segmented the Atmospheric Water Generator Market based on process, end-use, power source, and region.

In the first level, process segment has been further segmented into cooling condensation, solid desiccation, and wet desiccation.

- **Cooling Condensation:** Includes the atmospheric water generators which use a cooled surface to convert moisture from air to water.
- **Wet Desiccation:** Includes the atmospheric water generators which use liquid desiccant including lithium bromide or lithium chloride to convert moisture from air to water.
- **Solid Desiccation:** Includes the atmospheric water generators which use solid desiccant including silica gel or zeolites to convert moisture from air to water.

In the second level, end-use segment has been categorized into residential, commercial, and industrial.

- **Residential:** Includes low production atmospheric water generators which are designed to fulfill the demands of households.
- **Commercial:** Includes medium production atmospheric water generators which are designed to fulfill the demands of commercial buildings, offices, schools, hospitals among others.

- **Industrial:** Includes high production atmospheric water generators which are designed to fulfil the demands of industries, factories among others.
- **Others:** It includes other end-users including government and defense organizations.

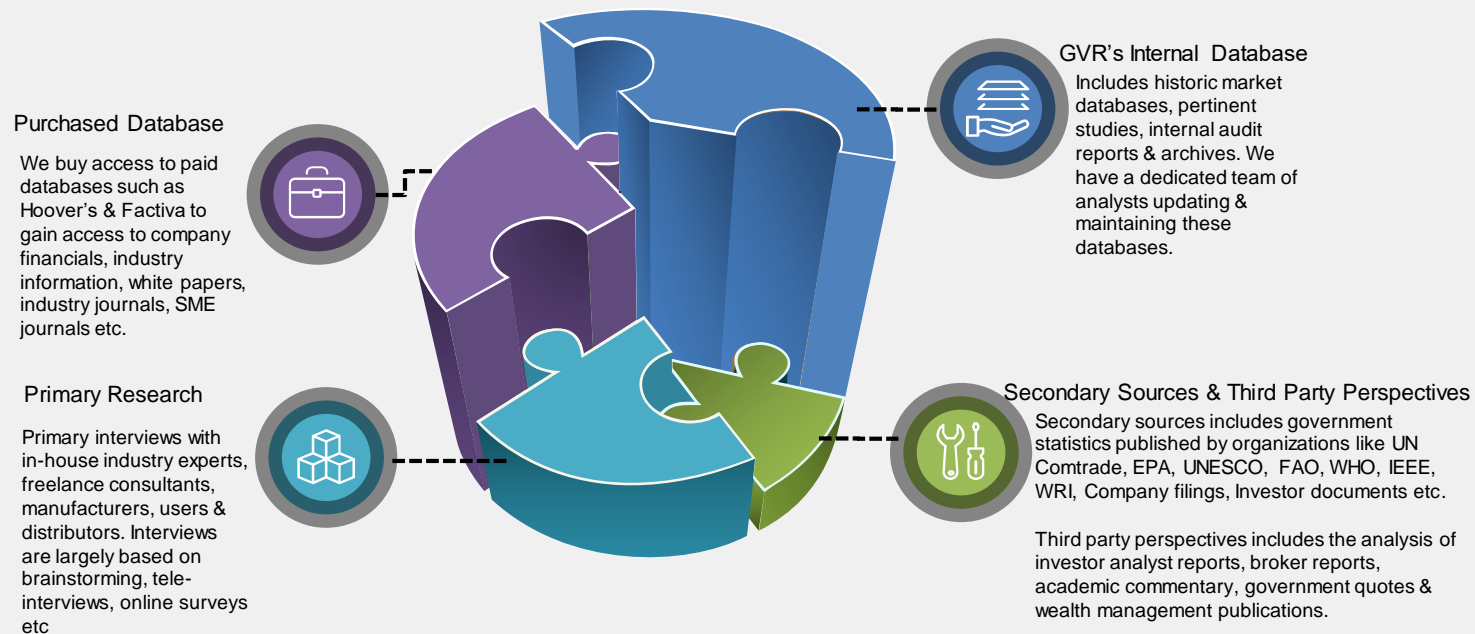
In the third level, power source segment has been categorized into electricity, battery, solar, and others.

- **Electricity:** Includes atmospheric water generators which uses electricity as their primary power source. Electricity produced from nuclear power plants, fossil fuels, biomass, and geothermal energy.
- **Battery:** Includes atmospheric water generators which uses batteries as their primary power source.
- **Solar:** Includes atmospheric water generators which uses solar power as their primary power source.
- **Others:** Includes atmospheric water generators with other power sources produced from wind turbines, hydro turbines, and gas turbines.

9.2 Information Procurement

Fig.25 Information procurement

The stage involves the procurement of market data or related information via different sources & methodologies.



Information procurement is one of the most extensive stages in our research process. As illustrated in the figure above, the techniques can broadly be categorized into five sections, as stated below:

9.2.1 PURCHASED DATABASE

- Includes company databases such as Factiva: This helps us compile metadata on historical sales volumes, prices, company revenues, and other industry statistics. Also, it serves as an important step in market sizing, especially, in case of commodity-flow techniques
- Other sources include SME journals, pertinent databases from third-party vendors to gain insights into:
 - Usage rates
 - Potential market-related statistics
 - Information on unmet needs
 - Regional expenditure pattern
 - Investment information or opportunity-based statistics

9.2.2 GVR'S INTERNAL DATABASE

- Includes our internal database of data points, collected as a result of previous research & studies and information made available via our database management team
- Also includes internal audit reports & archives

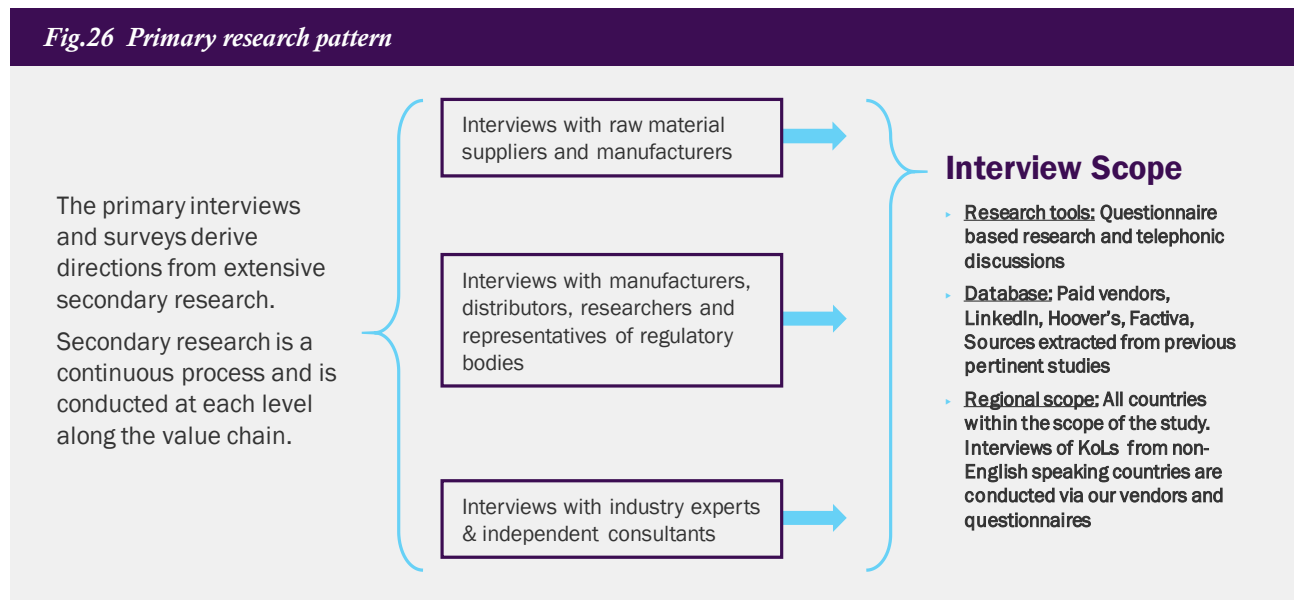
9.2.3 SECONDARY SOURCES

- A list of secondary sources along with the information extracted from them will be available in the final deliverable.
- Sources consulted during preliminary phase include ICIS, D&B, CFPA, U.S. EPA, and Company Websites
- Notable examples include white papers, government statistics published by organizations like UN Comtrade, World Bank, UNESCO, WHO, FAO, EPA, company filings, investor documents etc.
- Secondary databases are aimed at gathering market intel, historical statistics, product classifications according to SIC, NAICS, HS codes, and to understand trends available through public domains.

9.2.4 THIRD PARTY PERSPECTIVE

- This section includes market derivation through investor analyst reports, broker reports, academic commentary, government quotes & wealth management publications.

9.2.5 PRIMARY RESEARCH



9.3 Information Analysis & Data Analysis Models

Information procured from secondary and primary initiatives are then, analyzed by using the following tools/models: (a partial list)

- Identifying variables and establishing market impact
- Establishing market trends
- Analyzing future opportunities and market penetration rates by understanding product commercialization, regional expansion etc.
- Analyzing changes in the industry dynamics to establish future growth
- Analyzing sustainability strategies adhered by market participants in an attempt to determine future course of the market
- Analyzing historical market trends and super-imposing them on the current and future variables to determine year-on-year trend
- Keeping a track of technological advancements in individual segments
- Base numbers are established by analyzing the following:
 - Company revenues and market share (this list generally includes the analysis of revenue published by publicly listed manufacturers)
 - Derivation of market estimates via analyzing parent and ancillary markets

However, it is difficult for us to currently state the methodology or model that we would follow while, catering to the client requirements, we propose the use of the following models (a partial list):

- Model selection: demand-based bottom-up approach and mixed approach (top down and bottom up)

Fig.27 Primary research process

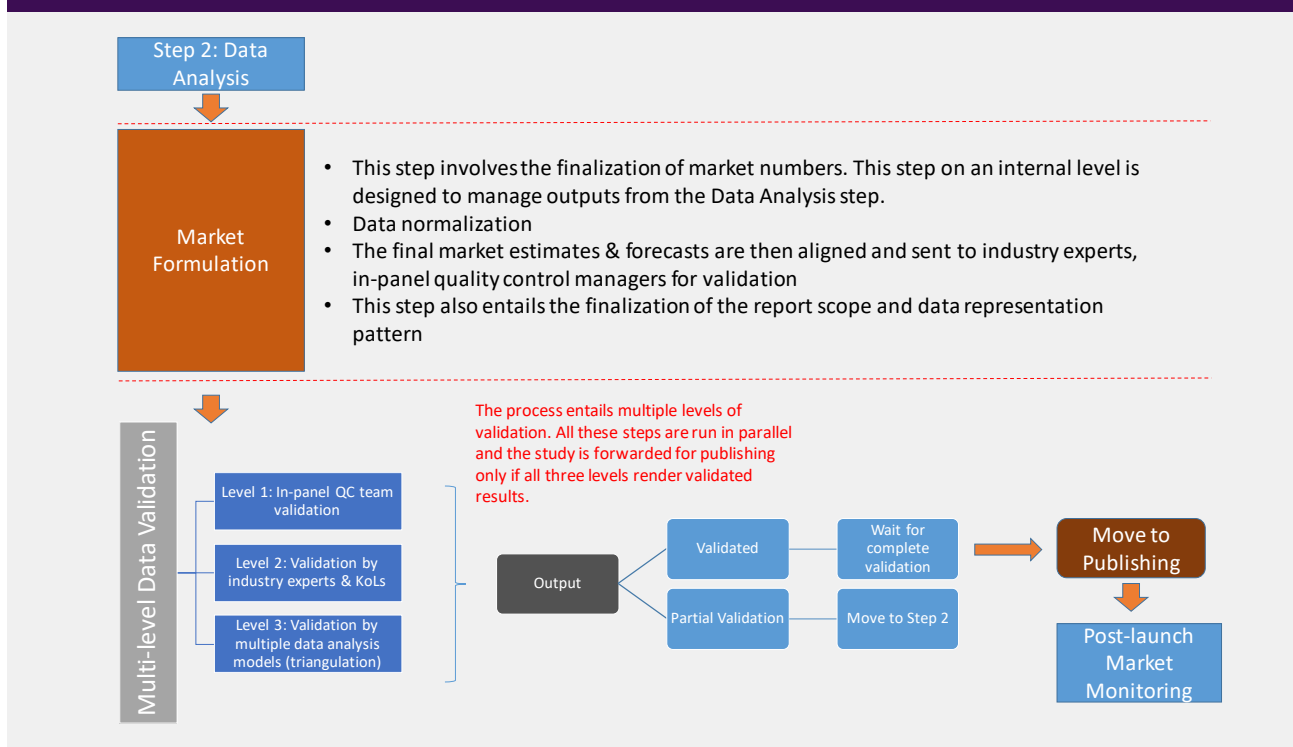
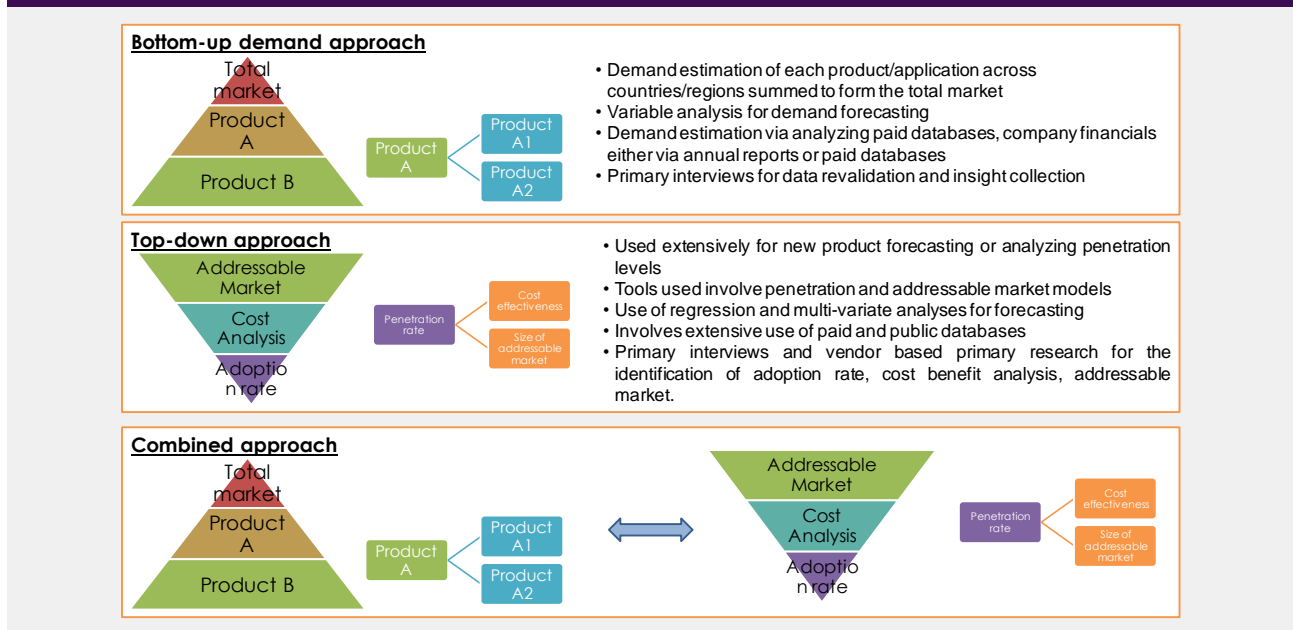


Fig.28 Primary research approaches



- Penetration modeling for products
 - Determining and forecasting penetration via analyzing product features, proposed pricing, availability of internal and external substitutes etc.
 - Heuristic estimation of year-on-year sales by conducting primary interviews with:
 - Manufacturers & distributors
 - Industry experts & KoLs
 - Distributors
 - Product sizing and forecasting by following a diffusion model based on S-curve growth

Analysis of current usage rates and dosage patterns to determine substitution rates

- Regression and variable analysis
 - Identifying variables and assigning impact to determine growth)
 - QFD modeling for market share assessment
 - Referring to historic data to establish base estimates
 - Using exponential smoothing for forecasting
- Epidemiology or user size-based penetration
 - Analyzing current needs and determining penetration to estimate market size or sales
 - Using unmet needs and capitalization rates to determine growth
- Trend analysis (based on year on year trending models)

9.4 List to Data Sources

Some of the **secondary sources** used for this report

- U.S. Environmental Protection Agency (EPA)
- United Nations Educational, Scientific and Cultural Organization (UNESCO)
- United Nations (UN)
- Institute of Electrical and Electronics Engineers (IEEE)
- World Resource Institute (WRI)
- Food & Agriculture Organization (FAO)
- World Health Organization (WHO)
- Web Journals
- Company Websites
- Company Annual Reports
- Hoovers

Some of the **primary sources** used for this report include but are not limited to

- Vayujal Technologies Pvt. Ltd.
- Acqua Dall 'Aria

9.5 List of Abbreviations

Table 1 List of Abbreviation

CAGR	Compound Annual Growth Rate
AWG	Atmospheric Water Generator
RH	Relative Humidity
Wh	Watt hour
WHO	World Health Organization
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations International Children's Emergency Fund
WRI	World Resource Institute
HZ	Hertz
KW	KiloWatt
HVAC	Heating, Ventilation, and Air Conditioning

Report FAQs

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- ▶ We offer risk-free purchases. We will let you explore our report online through the conference without purchase commitment. You can also request a free sample to evaluate the report quality before making a purchase decision.
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- ▶ For client testimonials, case studies or additional questions, please reach out to us

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- ▶ Yes, we offer free customizations within the research's scope
- ▶ 75% of our engagements are based on customized market reports
- ▶ Clients have free access to pre-sale analyst briefs to discuss requirements and recommendations

10.3 I have a pre-defined budget. Can I buy chapters/sections of this report?

- ▶ Yes, we sell sections of our reports
- ▶ You also have the option to buy excel & PPT versions of our reports.
- ▶ You may buy customized market intelligence based on your budget. We have a product to offer irrespective of the price point

10.4 How do you arrive at these market numbers?

- ▶ Our research methodology is a three-step cyclic process:
- ▶ It starts with Information Procurement from internal DBs, paid primary and secondary sources
- ▶ The second step is Data Analysis and Modeling
- ▶ The third step is by Data Validation via industry expert opinions
- ▶ For a detailed research methodology, please request for a sample report.

10.5 Who are your clients?

- ▶ We cater three categories of clients: manufacturers and market participants, academicians, and investment banks and venture capitalists
- ▶ We service more than 1,500 clients annually. More than half of our clients re-engage us for additional reports and services.

10.6 How will I receive this report?

- ▶ The report will be delivered to you via PDF, Excel, PPT downloads & BI dashboards
- ▶ Post purchase you will receive an email with a link to access the report on our proprietary platform - Compass

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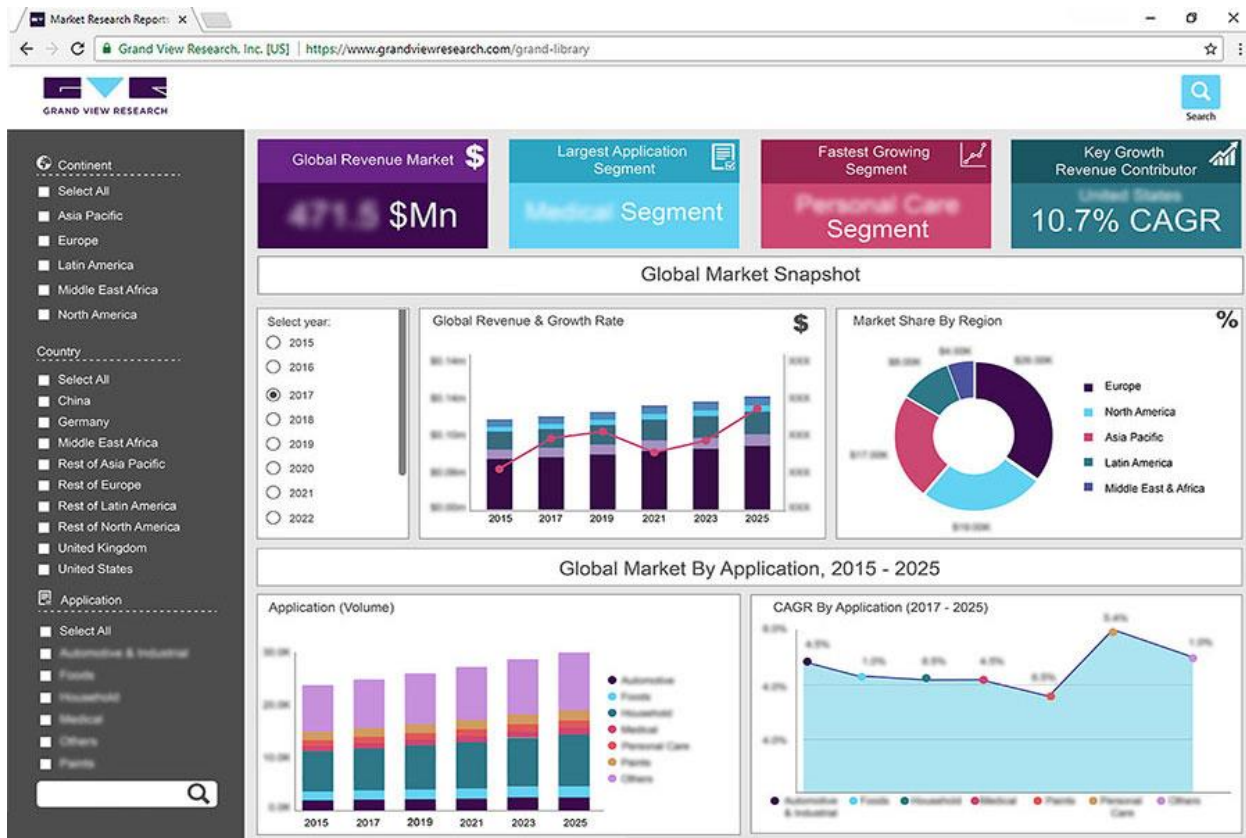
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