

Point of Use Water Treatment Systems Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Under the Counter Filters, Countertop Filters, Pitcher Filters, Faucet-mounted Filters, and Others), By Category (RO Filters, UV Filters, Gravity Filters, and Others), By Application (Light Commercial, Residential, Non-Residential), By Region & Competition, 2021-2031F

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Abstracts

The Global Point of Use Water Treatment Systems Market is projected to expand from USD 14.29 Billion in 2025 to USD 20.64 Billion by 2031, reflecting a compound annual growth rate of 6.32%. These decentralized filtration systems, installed directly at locations like faucets, countertops, or under sinks, are engineered to eliminate contaminants immediately before consumption. The market's momentum is largely driven by rising global awareness of waterborne pathogens and decaying municipal infrastructure, which often introduces pollutants such as lead and microplastics into the supply. This anxiety regarding water quality significantly fuels consumer uptake, a trend highlighted by the Water Quality Association's 2025 data, which revealed that 58% of U.S. households expressed concern about the safety of their tap water.

Despite this demand, a major obstacle restricting broader market growth is the recurring operational cost and maintenance required for these systems. Users often struggle with the financial burden and inconvenience of mandatory filter replacements necessary to maintain system performance. This high total cost of ownership frequently results in consumer hesitation or the abandonment of units, particularly among price-sensitive demographics where long-term affordability is a significant barrier to entry.

Market Driver

Stringent government regulations regarding drinking water safety serve as a primary catalyst for market expansion, pushing both municipal bodies and individual consumers toward advanced filtration technologies. Regulatory agencies are progressively tightening standards for legacy contaminants, creating a compliance gap that point-of-use systems effectively address. This legislative pressure encourages the residential and commercial adoption of under-sink and faucet-mounted units as an immediate defense against infrastructure-related non-compliance. For example, the U.S. Environmental Protection Agency's National Primary Drinking Water Regulations for Lead and Copper Improvements (LCRI) took effect on December 30, 2024, mandating aggressive lead service line replacements and rigorous tap sampling, which fuels consumer reliance on certified filtration devices.

Concurrently, rising global levels of water contamination and industrial pollutants, especially per- and polyfluoroalkyl substances (PFAS), are accelerating the demand for specialized purification solutions. As scientific detection methods become more sophisticated, the widespread discovery of these persistent chemicals influences consumer purchasing habits and increases the need for high-efficiency membrane technology. In July 2025, the U.S. Geological Survey released updated data confirming persistent PFAS detections in public water systems, reinforcing the urgency for decentralized filtration. This heightened concern translates into market success; A. O. Smith Corporation reported in January 2025 that its full-year 2024 net sales reached \$3.8 billion, noting that higher water treatment volumes helped offset volume declines in other residential segments.

Market Challenge

The continuous operational costs and maintenance requirements of point-of-use (POU) systems constitute a significant hurdle to the sustained growth of the global market. Unlike the one-time cost of buying a filtration unit, the total cost of ownership builds up through mandatory, recurring filter replacements and system upkeep needed to ensure filtration effectiveness. For consumers with limited budgets, this ongoing financial obligation often outweighs the initial value proposition, causing purchase hesitation or the eventual abandonment of installed systems once the first filter cycle ends. As a result, manufacturers face challenges in retaining long-term users, which limits recurring revenue potential and stalls widespread adoption in demographics with restricted disposable income.

This economic barrier effectively limits the conversion of heightened consumer safety concerns into sustained market volume. While a lack of confidence in municipal infrastructure drives initial interest, the financial commitment required for effective, uninterrupted treatment remains a formidable obstacle. According to NSF International, in 2024, only 52% of filtration owners reported trusting the tap water in their homes. This statistic underscores a critical disparity; although a significant portion of the population distrusts their water supply, the high operational costs of maintaining POU solutions prevent many from bridging this trust gap with a permanent solution, thereby directly hampering overall market growth.

Market Trends

The adoption of sustainable materials and biodegradable filter cartridges is emerging as a defining market characteristic as environmental consciousness increasingly influences purchasing decisions. Manufacturers are prioritizing eco-friendly designs that reduce plastic waste, positioning their systems as essential tools for achieving personal and corporate sustainability goals. This shift is supported by tangible environmental metrics that validate the sector's contribution to the circular economy. According to Culligan International's '2024 ESG Report' released in June 2025, the company's installed base of filtration solutions collectively displaced approximately 40 billion single-use plastic bottles globally in 2024, highlighting how green materials and waste-reduction capabilities are evolving from niche selling points into core competitive requirements.

Simultaneously, the expansion of Water-as-a-Service and subscription-based business models is fundamentally reshaping revenue structures and consumer access. By replacing significant upfront hardware investments with manageable recurring fees, companies are successfully bypassing the traditional barrier of high ownership costs while ensuring optimal system performance through scheduled maintenance. This recurring-revenue approach is gaining rapid traction as it aligns with modern preferences for flexibility; according to Coway Co., Ltd.'s 'Q1 2025 Financial Results' from May 2025, the firm achieved a 63.0% year-over-year increase in domestic net rental account additions, totaling 103,000 new subscribers in a single quarter. This robust growth indicates a pivotal shift in consumer behavior toward "usership" models, allowing manufacturers to deepen market penetration and secure long-term customer loyalty in price-sensitive segments.

Key Market Players

A.O. Smith Corporation

Brita GmbH

Pentair PLC

Helen of Troy Limited

Culligan International Company

Unilever PLC

Panasonic Corporation

LG Electronics

Best Water Technology Group

Kent RO Systems Ltd.

Coway Co. Ltd.

Report Scope

In this report, the Global Point of Use Water Treatment Systems Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Point of Use Water Treatment Systems Market, By Product Type

Under the Counter Filters

Countertop Filters

Pitcher Filters

Faucet-mounted Filters

Others

Point of Use Water Treatment Systems Market, By Category

RO Filters

UV Filters

Gravity Filters

Others

Point of Use Water Treatment Systems Market, By Application

Light Commercial

Residential

Non-Residential

Point of Use Water Treatment Systems Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Point of Use Water Treatment Systems Market.

Available Customizations:

Global Point of Use Water Treatment Systems Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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