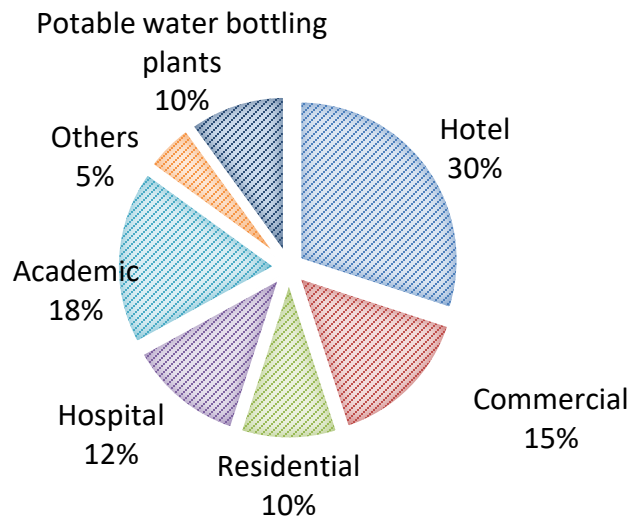


# The market for Point of Entry water purification systems in India

- Point of Entry (PoE) systems are capable of treating raw water with TDS levels between 500 to 2000 mg/L to produce purified water with TDS less than 50 mg/l
- The Point of Entry (PoE) water purification systems market in India (excluding chemical treatment) was valued around INR 4,500- 5,700 million in 2016
- The market in volume terms is estimated in the range of an average of 15,200 units
- Premium to luxury hotels have installed PoE systems to ensure supply of quality water to the rooms.

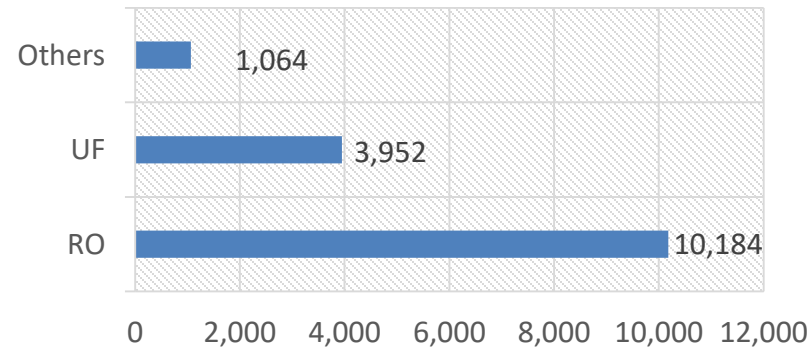
**PoE water purification systems: Breakup by end use, 2016**  
Total Sales: 15,200 units (approx.)



Source : MCG estimates

- PoE water purification equipment largely comprise of membrane based technologies- Ultra Filtration, Reverse Osmosis or combinations thereof
- Other technologies such as UV, distillation and capacitive de-ionisation have been reported sparingly
- With increased focus on limiting wastage of water, more efficient technologies such as capacitive deionisation are being considered in select locations
- As a general trend, chemical purification processes are slowly giving way to mechanical systems.

**PoE water purification systems: Breakup by technology, 2016**  
Total: 15,200 units (approx.)



Source : MCG estimates

- In India, there is a greater preference for multiple units of lower capacities rather than single unit of large capacity
- PoE systems in capacities 500 lph and lower capacities account for 60% of the market.

## PoE Market characteristics and trends

PoE systems have low penetration levels in the Indian market

There is a lack of clarity among customers about the role of PoE systems in the water purification value chain

Many bulk users have adopted chemical based technologies

PoE systems are mainly targeted at middle and premium level markets leaving the mass market virtually untapped

## Key Players

- Domestic PoE systems industry has low entry barriers and is fragmented
- The PoE water purifiers industry has the presence of large players with national presence as well as a number of regional players
- Large players have around 20% share of the market where as the small/ regional players account for 80% of the market
- Ion Exchange is the leading player in the PoE market in India with a share of around 6-7% followed by Eureka Forbes with share of around 4% in the PoE segment
- Other key manufacturers in the PoE systems market in India include Thermax, Voltas and Kent