

TRUSTED ADVISORS TO LEADING ORGANIZATIONS INVOLVED  
WITH WATER IN HOMES & COMMERCIAL ESTABLISHMENTS

## STATEMENT OF CAPABILITIES

**For more than 40 years—and in over 50 countries—**Baytel’s research, insights and strategies have helped companies and organizations define, launch, promote, distribute and maintain exciting new products that treat, store, purify, heat, chill, and dispense water in homes and commercial establishments.

The clients that Baytel has worked with constitute a “Who’s Who” of the leading global players involved with bulk bottled water or products and appliances used to treat and store water in the home.

### We Monitor Industry & Technology Developments and Consumer Behavior

Baytel’s team of principals, consultants, industry experts and analysts continually monitors and evaluates the relevant industries and their suppliers, the technical developments, and consumers. We conduct surveys, we interview consumers and key industry participants, we do retail and direct sales audits, and we track companies, patents and a variety of other relevant things online. We supply information and insights that our clients value. We show them how best to take 2 + 2 to make 5.

### Information, Insights & Strategy; Innovative, Seasoned Expert Advice

Baytel supplies the information and insights that companies and organizations need to succeed in the global markets for residential and commercial water treatment and storage products. We have extensive experience understanding how consumers think and behave when making choices between tap water, bulk (home-and-office-delivered) bottled water, and home water treatment and storage products: filters, purifiers, storage containers, dispensers, and sports bottles for people “on the go.”



**“ Baytel’s residential water treatment reports have been valuable in our market assessment activities, particularly due to the detail provided from having experienced people on the ground actually investigating the market dynamics.”**

*— Dow Water & Process Solutions*



Sometimes outside help is needed to move things along

We provide confidential consulting services as well as off-the-shelf market, industry and technology reports. **Baytel's coverage is global.**

Baytel's principals are experts. Each has decades of first-hand experience conducting primary research into, and providing consulting services in the area of residential and commercial water treatment and storage. Since 1986 we have gained substantial first-hand feet-on-the-ground experience in each of the key global markets for residential and commercial water treatment products. Baytel itself has been in business since 1979.

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**“ Baytel delivered excellent value for the money, especially when compared with a number of the ‘big name’ market research firms that we have had occasion to make use of in the past.”**

— Monsanto

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## Not Just Markets & Consumers: We Also Understand Technology & Manufacturing

Baytel's Principals have multiple advanced degrees in disciplines like electronics, computer science, biology, molecular genetics, mathematics, etc. We make it a point to understand and provide coverage of all relevant technologies enabling these products.



A water tanker making daily deliveries in Mumbai



One member of our team was formerly a VP at one of the major global players in residential and commercial water treatment and has an in-depth understanding of water filter manufacturing methods, costs, and issues. We have assisted key global and regional players with technology analyses, sourcing issues, manufacturing plans, and strategic planning in this area.

We have developed access to, and have cultivated, the best outside industry experts and consultants. We also have access to long-standing key industry insiders whose trust we have earned over the years. What information we don't have in-house we know how to quickly and reliably obtain.

We have advised major global players about technologies like membrane filters (reverse osmosis, ultrafiltration, etc.), various types of carbon and other media filters, disinfection techniques (ozonation, UV, biocides, iodinated resins, bromine beads, etc.), end-of-life sensors & indicators, consumer interface ergonomics, structural plastics, water quality sensors, matters of aesthetics (taste & odor, appearance), etc.

## Confidential Custom Consulting Services

In addition to its syndicated (multi-client) reports covering the markets, business opportunities, and enabling technologies for home water treatment, Baytel offers its clients completely confidential, custom consulting services. We are very much aware of confidentiality considerations and we routinely execute mutual non-disclosure agreements.

### AREAS OF EXPERTISE

Home Water Treatment Markets

Bulk (19-L) Bottled Water Markets

Utility, Well & Tanker-Delivered Water

Residential Water Storage

Tap Water Usage & Availability

Water Conditioning & Water Heating

Water Treatment Technologies

Certifications & "Trust Marks"

Water Quality & Safety

Consumer Attitudes

Distribution Channels

Global Coverage

Strategy



Confidential custom consulting projects are tailored to client needs.

Typical projects involve:

- Strategic options for global or regional growth
- Strategy workshops
- Exploring business adjacencies
- Finding/suggesting business partners for technology acquisition or product development
- Global or country/region-specific market assessments
- Potential product concept assessments
- Market research (both qualitative and quantitative methods are used)
- In-country field research including visits to homes, as well as commercial, educational, governmental, industrial, agricultural, municipal, and health care establishments
- Access to proprietary in-house Baytel market, technology and industry databases spanning 25+ years
- Voice of the Customer research
- Claim validation
- White papers
- Ranking markets as to sales potential
- Market entry strategies
- Locating/suggesting distribution partners
- Acquisitions research
- What it takes to vertically integrate: get into manufacturing one's own components
- Competitive intelligence: information & insights into companies, business units, products, technologies

**“Your presentation is still getting rave reviews from all who attended”**

— Amway Corporate Marketing

## Original Photos from Baytel's In-Country Research



A Chinese family gathers for a home-made meal and a conversation about water with Baytel researchers



This retired Brazilian woman brings spring water home for drinking, but uses tap water for dishes.



Transporting drinking water between islands in Indonesia



Filling water tankers for delivery to homes & offices in Mexico



A Baytel Retail Audit in Australia



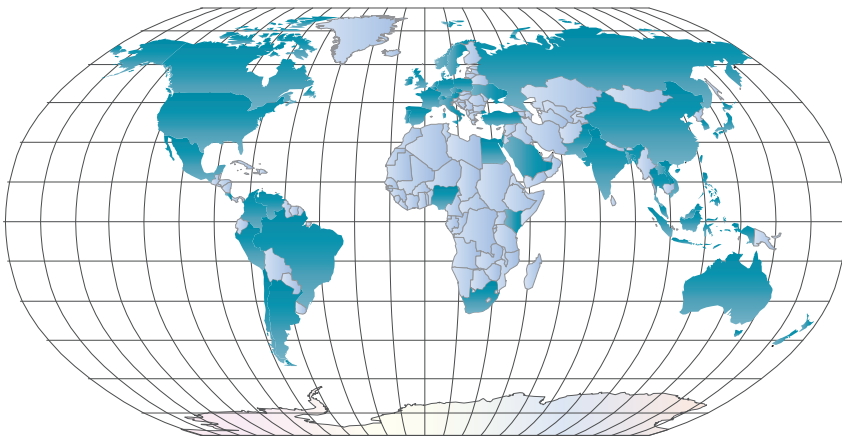
## More Typical Examples of Client-specific Custom Projects

- Who is manufacturing what, where, how?
- Technology research
- Performance claims/issues
- Value chains
- Sourcing options (systems, components, technologies)
- Features & Benefits: what consumers like & dislike about existing or contemplated products
- Pricing Research and Pricing Strategy
- Virtual shopping (results of retail and direct sales “audits”—these may include photographs)
- Investment opportunities
- Custom presentations & seminars

Baytel’s findings are conveyed to clients through lively presentations and reports. These typically include numerous visuals—including high-resolution photos from Baytel’s extensive proprietary database of photos taken in the field by Baytel’s principals and consultants.

Baytel has been studying consumers’ interactions with water in the home for more than 30 years, in some 50 countries, on five continents. Over the years we have had the privilege of working with companies and people highly skilled in understanding consumers, water availability & quality, and water treatment products and services.

Current Baytel Coverage:



## Original Photos from Baytel’s In-Country Research



A dug well supplies water for this family in rural Kerala



A Reverse Osmosis System in Korea



Home Water Storage in Mexico



Brita Products in Taiwan



Bulk Bottled Water at a Store in the Philippines

We have learned a great deal from our clients and from the people we have interviewed. We know what has worked for companies by way of technology, product features, pricing and distribution, and what has not. We know what the trends and opportunities are, and what the pitfalls have been. We know the players. We know the distribution channels. **Let us put our knowledge and experience to work for you!**

**We have visited countless homes around the world**, to see how families in different economic classes use bulk bottled water, tap water, stored water, and water treatment products. We ask them what they like about these products, what they dislike about them, and why.

Similarly, **we have visited hundreds of retailers**, in countless cities and villages throughout the world, to see what they carry, how it is priced; what is moving and what is not. Many retailers in emerging markets do not scan and track sales of products. We ask them what their sales are like, what kinds of consumers are buying their products, on what basis these consumers make their purchase decisions, and why.

Water treatment and dispensing products in much of the world are distributed using **direct sales**, with information about the size and performance of the sales networks involved generally not readily available. Baytel “audits” the selling methods of the major direct sales networks involved with water filters and purifiers.

We have also done this kind of work in coffee shops, restaurants, hotels, universities, schools, hospitals, nursing homes, clinics, factories, R&D labs, farms, and other commercial, industrial, municipal and government institutions, and trade associations.

Benefit from Baytel’s experience, information, and insights, whether the project is large or small. Contact Baytel today to discuss how we can help you meet your goals. There is no charge or obligation for an initial consultation.

Baytel has been focused on water in homes & commercial establishments for over 30 years. Our clients have ranged from small technology-driven startups to global suppliers of consumer products, beverages, chemicals, filter media and appliances.

Consulting projects undertaken at Baytel are carried out by Baytel principals, each of whom has decades of experience in the field. We tell it as we see it. We ask tough questions and come up with real, actionable answers. We believe our record speaks for itself.

## Global Coverage—by Baytel Principals





## Baytel Presentations and Reports

Baytel offers excellent live presentations. A mutual confidentiality agreement followed by an initial half day presentation covering the global (or a regional or a country-specific) market and the key players for home water treatment products is often an excellent way to kick off a new client relationship.

Baytel's reports are a great way to rapidly and efficiently disseminate the information needed by your water team. They are very highly regarded by the industry and include essential information, data and insights that are clearly and succinctly presented. Numerous photos, graphs and charts are used.

**Baytel offers clients both syndicated/multi-client country market and business opportunity reports, as well as custom studies prepared on demand.** Projects are client-driven and include coverage of enabling technologies, markets, product concept testing, business strategy, manufacturing options, competitive intelligence, value chains, etc.

Baytel's multi-client reports are relied on and respected for their breadth and depth of coverage. Detailed, authoritative, up-to-date, and insightful, these reports will help you plan, grow, and optimize your business in more than 50 countries.

**Baytel's "off-the-shelf" country market and business opportunity reports include detailed and in-depth information about:**

- Market Sizes (Historical Trends and Informed Projections/Forecasts)—a Quantitative Analysis including:
  - Segmentation by product type (location/configuration, technology; system vs. consumables)
  - Segmentation by region of the country
  - Segmentation by distribution channel
- Interaction with Competing and Complementary Products (Bulk Bottled Water, Tap Water)
  - What Consumers Like and Dislike about Home Water Treatment Products & Services, as well as Bulk Bottled Water and Tap Water
  - Actual product quality vs. consumer beliefs/perceptions for tap water where it is used, bulk bottled water, and water treated by home water treatment products



- Distribution Channels
  - By Type of Retailer (e.g. hypermarket , supermarket , hardware store, plumbing wholesaler, department store, home improvement/construction materials, specialized stores, water treatment dealers, etc.)
  - Direct Sales & Rentals (including type of network)
  - Online Sales
  - Building Contractors (Construction Firms)
- Promotion & Advertising
- Prices Paid (or that consumers would be prepared to pay), Financing Offered
- Aftermarket Sales

- Product Use in the Home (Baytel does in-home studies and provides photographs of how these products are used in homes of different economic class)
- Market Issues & Drivers
- Trust Marks (certifications, seals of approval, “tested by xxx,” etc.)
- Product Claims, by brand, model, and company
- Regulatory Environment (specifics, advantages conferred on local players, etc.)
- Business Opportunities (actionable advice and insights, specific contacts, and so on)



**“Worth the expense. Original research and insightful analysis.”**

— *3M Purification*

	Baytel Associates	Leading Competitors
“Feet-on-the-ground” In-Country Research by Company Principals	✓	✗
Publicly Endorsed for Strategy by Leading Industry Players	✓	?
Exclusive Focus on Water	✓	✗
All Partners Have Advanced Technical Degrees & Decades of Directly Relevant Experience	✓	✗
Interview Key Industry Participants, Survey Consumers, Proprietary Photos of Retail & Direct Sales Audits in 45+ Countries	✓	✗

**“Essential in developing successful strategic plans in this growing and increasingly complex marketplace.”**

— *Robert Slovak*

*The engineer who developed residential RO*

**“Much of my career has been in the home water treatment industry and Baytel supplies the best information anyone can find. You get real value for your money.”**

— *Andrew Warnes*

*formerly of PRF (a GE / Pentair JV), former International Director, WQA, Member WC&P Technical Review Committee*

## Contacting Baytel Associates

Baytel can be reached by phone or email. We are located on the East Coast of the United States, in New Jersey.

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