

**Baytel
Associates**

The Choice of
Industry Insiders

2025 edition.

- ✓ 50 Countries covered individually
- ✓ Separate data for multiple **PRODUCT TYPES**
- ✓ Drinking water filters & purifiers
- ✓ Softeners & problem water systems
- ✓ POU vs. POE vs. bottled & tap water
- ✓ New & replacement unit shipments
- ✓ Consumables (cartridges, media)
- ✓ Refrigerator water filters
- ✓ Product distribution & penetration
- ✓ 2-year and 5-year market forecasts
- ✓ Global, Regional & Country totals
- ✓ More than 360 data tables
- ✓ Hundreds of photos, images, graphs

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THE GLOBAL MARKET FOR RESIDENTIAL WATER TREATMENT PRODUCTS

And Their "Consumables"

Now Available as Regional
Modules * * * * *

Baytel Associates

2025
edition

The Global Market for Residential Water Treatment Products (and their “consumables”)

2025 edition



This comprehensive information product:

- Covers all types of water treatment products used by consumers—filters, purifiers, softeners, appliances, and more...
 - Provides the insights you need for success with these products and their “consumables” (replacement filters, membranes, UV-c modules, softener salt, and so forth)
 - Includes 50 data-packed, individual country market analyses—PLUS regional & global totals
-

Supply and demand for these products has been changing in different ways in different countries:

- Supply chain issues and geopolitical tensions have caused manufacturers to shift suppliers and move manufacturing facilities
 - Increased demand due to Health Concerns, Lockdown Experiences, Politics, Working Remotely, etc. varies by country
 - Lowered demand due to Spiking Energy Costs, Inflation, Food Costs, Concerns about the Economy, Wars, and so on, ... the list goes on...
 - Get the reliable current data and insights you need for product planning & business strategy in a changing world!
-

The best, most comprehensive report available on this industry:

- Baytel has carried out research into this market “boots on the ground” — all over the world
 - Baytel has been wholly focused on this product category for 35 years! 35 years of data!
 - Baytel analysts are grounded in the sciences and understand the underlying technologies
 - Baytel has consulted for key participants in this market, including a number of influential global and regional players, and including two Private Equity giants
-

Baytel Associates — The Choice of Industry Insiders

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Release Schedule

US & Canada

Europe

Latin America

Middle East

Africa

East Asia

China

Southeast Asia

South Asia

Oceania

Now Shipping
Shipping Soon
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WHAT Residential Water Treatment

WHERE

Fifty (50) Individual Country Chapters

Nine World Regions

★ Fifty Countries ★



Now Available as Nine Individual Modules

USA & Canada

United States

Canada

Latin America

Mexico

Costa Rica

Argentina

Brazil

Chile

Colombia

Peru

Venezuela

Other Latin America

Other

Not Included Elsewhere

Europe

Austria

Belgium

Czech Republic

Denmark

France

Germany

Ireland

Italy

Netherlands

Norway

Poland

Portugal

Russia

Spain

Sweden

Switzerland

United Kingdom

Ukraine

Other Europe

Southeast Asia

Indonesia

Malaysia

Philippines

Thailand

Laos

Vietnam

Other Southeast Asia

South Asia

Bangladesh

India

Pakistan

Other South Asia

Oceania

Australia

New Zealand

Other Oceania

Middle East

Egypt

Israel

Saudi Arabia

Turkey

Other Middle East

Africa

Kenya

Nigeria

South Africa

Other Africa

East Asia

China

Japan

South Korea

Taiwan

Other East Asia

HOW MANY • WHAT KIND • WHEN

Market Breakdown

Product Types

Distribution Channels

Leading Market Shares

Market Characteristics

Market Drivers

Market Conditions

Market Directions

Current Market

New Systems (Units)

New Systems (Dollars)

Consumables, Service

2+5 Yr Forecasts

New Units (000)

New Units (\$)

Consumables (\$)



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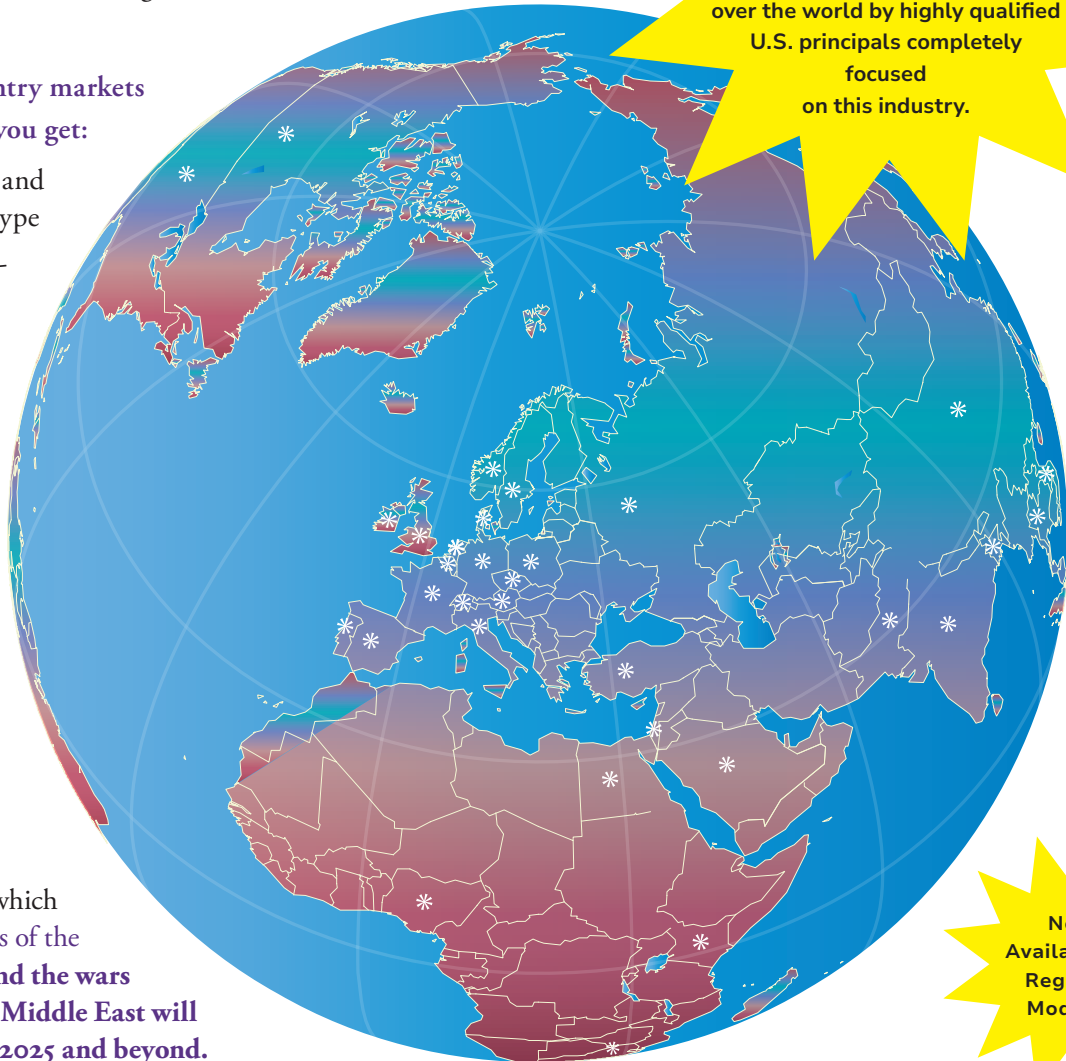
The Global Market for Residential Water Treatment Products and Consumables

Product Overview

Baytel's 2025 report on the Global Market for Residential Water Treatment Products and Consumables provides the information you need. It covers 50 countries accounting for 99% of the global market's value—plus regional & global totals covering the rest of the world.

For each of the 50 country markets individually analyzed you get:

- Market size in units and dollars, by product type
- Consumables, installation and service spending
- Weighted average consumer prices by product type
- Market segmentation by product type
- Market segmentation by technology
- A brief narrative description of each country's market characteristics
- A forecast narrative which includes new analyses of the **impacts Covid-19 and the wars in Ukraine and the Middle East will have on markets in 2025 and beyond.**
- **Two- and five-year forecasts** in dollars and units
- Market share estimates for the leading players
- Issues and drivers



The **Brand New 2025 Edition** of Baytel's acclaimed report. It's based on decades of "feet-on-the-ground" research all over the world by highly qualified U.S. principals completely focused on this industry.

Now Available As Regional Modules

- Distribution channel analysis by dollar volumes
 - 230 photos
 - Relevant demographics,
 - 399 data tables, 117 graphs
- ...more...

Features & Benefits

- Built on four decades of in-country **field work** analyzing home water treatment markets—now in over 50 countries.
- Baytel’s 2025 industry model covers the entire global market: analyses of **fifty separate countries** plus **nine regional** totals and the **global total** in units and dollars.
- Separate figures for **systems vs consumables** (replacement cartridges, etc., plus revenues from installation and service).
- Countries are presented in parallel format (containing comparable data) so **comparisons are rapid and easy**.
- Leading company **market share** estimates for each country market.
- **Segmentation** by the leading product categories and by technology in each country market.
- **Average product prices** for each major product type by country.
- Covers **all POU types of home water treatment products** including:

- ✓ Inline (external) filters for appliances, etc.
- ✓ Specialty filters and embedded appliance filters,
- ✓ Refrigerator and ice-maker water filters,
- ✓ Filters and/or UV-c LED modules embedded in faucets/taps
- ✓ Whole-house (**POE**) water treatment products,
 - ⇒ Water softeners & scale inhibition products,
 - ⇒ Well water systems,
- ✗ Not included: water heaters and water coolers or dispensers that do **not** include filtration or purification.



Read what industry insiders have to say about this:

GOING OUTSIDE

For information, insights and strategy
in the home water treatment business

WHAT TO LOOK FOR WHERE TO GO

50 Countries, Plus Regional & Global Totals

- ✓ Housewares (filtering pitchers & sports bottles, faucet-mounted units, filters for coffee makers, etc.),
- ✓ Countertop / wall-mounted systems (plumbed and non-plumbed), including filtering and purifying dispensers,
- ✓ Free-standing systems,
- ✓ Under-sink systems,
- ✓ Water bars and similar products that heat, chill, purify, carbonate, and dispense water, etc.

- Argentina
- Australia
- Austria
- Bangladesh
- Belgium
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Czechia
- Denmark
- Egypt
- France
- Germany
- India
- Indonesia
- Ireland
- Israel
- Italy
- Japan
- Kenya
- Laos
- Malaysia
- Mexico
- Netherlands
- New Zealand
- Nigeria
- Norway
- Pakistan
- Peru
- Philippines
- Poland
- Portugal
- Russia
- Saudi Arabia
- South Africa
- South Korea
- Spain
- Sweden
- Switzerland
- Taiwan
- Thailand
- Turkey
- U.K.
- U.S.A.
- Ukraine
- Venezuela
- Vietnam

- Realistic **2- and 5-year forecasts** based on deep knowledge of the individual markets and **4** decades of experience.
- **Issues and drivers** for each market, presented in graphical format to facilitate comparisons.
- **Coverage of the impacts of COVID-19 and the wars in Ukraine and Gaza** on the market and its future.
- **Updated distribution channel** analysis covering the key channels as appropriate for each country's market:
 1. e-Commerce
 2. Direct Sales
 3. Specialty Water Treatment Dealerships
 4. Plumbing Wholesalers
 5. The Construction Trade
 6. Retailers, by type
 - a. Hypermarkets/Supermarkets
 - b. Department & Discount Department Stores
 - c. Home Improvement and DIY Stores
 - d. Hardware and Building Supply Stores
 - e. Kitchen & Bath Stores
 - f. Consumer Electronics Stores
 - g. Home Appliance Stores
- Explores **competing and complementary products**: bulk bottled water (10- to 20-liter jugs), tap water, and water storage.
- Grounded in **field research** carried out in person in countries throughout the world by Baytel principals and local research associates. Both **qualitative** and **quantitative research methodologies** were employed,

involving **interviews** with consumers, suppliers of systems, cartridges, and media; with people distributing and selling home water treatment products and services; and with public health and water utility officials, academics, and industry insiders, worldwide. Quantitative **audits** were carried out in **retail, online** and **direct sales** channels. The report's **399** data tables reflect Baytel's proprietary **quantitative model** of the industry, which has been verified and run through a **reality check: direct observations of the markets** covered.

ADDED HIGHLIGHTS

- More on bottled water in the home
- Bottled water segmented by region and small bottles vs ≥10 L jugs
 - "Soft Drink Alternatives" vs. "Tap Water Substitutes"*
- Heated, chilled, sparkling, flavored
- Impact of new technologies
- Water availability and storage issues
- Bulk bottled water vs. tap water vs. home water treatment products
- Emergence of **home water treatment appliances** from global appliance makers

GLOBAL OPPORTUNITIES!
THIS IS A REPORT
YOUR TEAM NEEDS.
CALL OR EMAIL
MATT MOES AT BAYTEL
TODAY!

THE BEST COMMERCIALY AVAILABLE REPORT

Yamaha Motor

- "Efficient, Reasonably Priced ... Baytel is a very small firm with low overhead. But in terms of the quality of its people and its research capabilities, **Baytel is capable of competing head on with the major consulting firms.**"

Kemflo

- "Your reports are highly rated / recommended by many others that I know... yours are **definitely my best choice.**"

Waterlogic

(Recently merged with Culligan)

- "**First thoughts** after giving the document about an hour of attention so far **are quite positive.**"

Toray

- "Dear Matt-san: We really appreciate your consideration and support. Also, **providing us with additional information is very kind of you.**"

3M Purification

- "Really helpful! Thanks for the follow up."

Brita (Clorox)

- "Great work... You have been a good partner"

Pentair, GE

- "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. These guys have been researching the markets and business opportunities in this product category since well before I became involved back in 1994."

Shaldor Strategy Consulting

- "We are the leading corporate strategy consultancy in Israel. When we needed market & industry expertise in the global home water treatment space **we came to the best-in-class supplier. Baytel Associates teamed with us to provide the industry-specific expertise that we lacked, and the collaboration exceeded expectations.** We would not hesitate to make use of their services again!"

NSF International

- "I can tell you that Mr. Moes is very professional and quite at ease while travelling in foreign environments. I have witnessed Mr. Moes' interactions with [our] Japanese hosts and he was **very gracious and accomplished in his understanding of cultural and business differences and interests.**"

Pur (then part of Procter & Gamble)

- "Standing Ovation!"

Whirlpool

- "You have good reports!"

Rohm & Haas

(Acquired by Dow)

- "Very thorough. A thoughtful approach!"



Ametek

- "I find the **Baytel research report** on the U.S. home drinking water treatment market to be **the most thorough, comprehensive, accurate, and refined of any available to date.** I would highly recommend it to anyone involved in the industry."

Teledyne Water Pik

(30 years ago!)

- "**The most complete source** of industry information available."

Amway

- "**Your presentation is still getting rave reviews** from all who attended!"
- "Everything you could ever want to know about the industry — in one spot!"

Shurflo (now part of Pentair)

- "**A sophisticated analysis of a complicated market.** Must reading for any executive who's serious about the drinking water business."

3M/Cuno

- "**An in-depth, comprehensive look** at a little understood market. People should buy this report and really read it."

BASF

- "**A well-written, comprehensive report** that is **accurate, readable, and utilizes excellent graphics.**"

Ecowater

(Now owned by Warren Buffet)

- "**A real credit to the Water Quality Industry—every manufacturer should buy a copy!**"

Emerson - InSinkErator

(Recently purchased by Whirlpool)

- "I was looking for actual industry experts who had personally spent time in each market and possessed a **hands-on understanding of the competitive landscape, technology offering, and overall industry trends**. The **Baytel team** are the true **global experts** when it comes to the water industry. Not only have they done extensive in-country research of almost every market in the world, they have consolidated that knowledge into high quality research reports which provide executives with the **critical information needed to assess business opportunities and weigh investment risks.**"

Dow Water & Process Solutions

(now DuPont Water & Process Solutions)

- "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."

Coway

- "Your reports covering Mexico and Brazil are **helping me understand the markets better.**"

Electrolux AB

- "We have now used Baytel's reports for [the home drinking water treatment markets in] China, Korea, the United States and Europe... [They] have been **comprehensive, well-structured and contained correct information...** They have proven to be **very useful to us** in our process to determine market opportunities... We look forward to future business contacts with confidence."

Unilever

- "Thanks for this.. I have just completed my tour of (city redacted) and agree with your view on the huge presence of refill BW market." "We have received the report on (country redacted), thank you. It is quite a detailed report and **let me compliment you and your team on making this very exhaustive analysis covering a very fragmented water purification industry.**"

Monsanto

- "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."

Unilever Ventures

- "A **fantastic analysis**. I really appreciate the time you put into these insights."

Pentair

- "A **terrific research report** on "The Global Market For Home Water Treatment Products And Services"

Aquion (Pentair)

- "Both Andy and I have read the report and found it **quite useful.**"



Brita GmbH

- "Baytel's reports are **well-researched and thus a valuable resource** for getting insights into markets. We appreciate their richness in details, which can be easily grasped as they are well-structured and well-written."

Robert Slovak

- "Essential in developing **successful strategic plans** in this growing and increasingly complex marketplace"

Amway

- "Endorsed for **Strategy, Competitive Analysis, Marketing, Analytics, Online Marketing, and Key Account Management**"

Brita GmbH

- "The feedback I received from all colleagues was **VERY positive.**"

Elken

- "Matt and the Baytel team are **true experts** on the subject matter. They do extensive research, on the ground, in the countries on which they report. We have purchased other reports, from "bigger" and more well known research firms. They are not nearly as good as those we've received from Baytel. I recommend them wholeheartedly."

Strauss Water

- "Hope you are doing well. The report is **very useful.**"

3M Purification

- "Worth the expense. **Original research and insightful analysis.**"

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Fifty (50) Individual Country Market Profile Chapters, Each Covering a Single Country's Market 13-378

Country chapters vary in length, depending on the market's size, complexity, and importance.
Each country chapter is packed with photos, graphs, tables, and concise, information-packed text.
Each of the 50 country chapters includes the following sections:

- Market Overview
- The 2023 Market
 - Weighted Average Price by Product Type / Configuration*
 - Number of New Units Shipped by Product Type / Configuration*
 - Systems Market in Dollars by Product Type / Configuration*
 - Consumables (cartridges & filters, media, etc.), Service, Installations & Rentals, in dollars, by type / configuration*
- Major Demographics & Water-Related Statistics (tap water, well/spring water, bottled water)
- The Market for New Systems Segmented by Type and Primary Technology
- Post-Covid Market Forecasts (2- and 5-Year Projections)
- Estimated Market Shares for the Leading Players
- Segmentation by Distribution Channel (for each major channel in that country)
- The Roles of Tap Water & Bulk (large jugs) Bottled Water
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- Impact of the Wars in Ukraine and the Middle East
- Issues and Drivers
- And MUCH MORE!**

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CONTACT BAYTEL TO REQUEST A REDACTED SAMPLE CHAPTER