

THE GLOBAL MARKET FOR HOME WATER TREATMENT PRODUCTS (vs. TAP WATER and BOTTLED WATER)

2024 Q1

Home water treatment products and services compete with and complement bottled water and tap water. These markets overlap: collectively they are worth hundreds of billions of dollars per year. Household water purifiers, filters, and softeners—as well as their replacement cartridges, media, and service contracts—account for a significant and growing share of the pie!

For 40 years, a small American company, Baytel Associates, has explored the technologies and global markets for the products that people use to improve the quality of the water they drink or otherwise use in their homes and elsewhere. Baytel's principals *each* have more than 35 years “boots-on-the-ground” experience researching the industry's opportunities worldwide.

Key players include **appliance giants** like A.O. Smith, Electrolux, Haier (GE Appliances), LG, Midea, Philips, Samsung, and Whirlpool, **beverage giants** like Coca-Cola, Danone, Nestle, and PepsiCo, **private equity giants** like Advent International, BDT Capital, and Bain Capital, **and others** including: 3M, Amway, Asahi Kasei (Crystal IS), BASF, Brita, BWT, ChungHo, Clorox, Coway, Culligan International, DuPont Water Solutions, Electrolux, Eureka Forbes, Helen of Troy (Pur), IAPMO, Lixil, Marmon Water (Ecowater, KX), Mitsubishi, NSF International, Nikkiso (Aquisense), Panasonic, Pentair, Pollet, Strauss, Toray, Unilever, WQA, **and soon** the \$8+ billion 3M spin-off: **Solventum**.

Every three years or so, Baytel updates its global mega-report comparing 50 country markets for home water treatment products that filter, purify, disinfect, heat, chill, carbonate, mineralize, optimize, adjust pH, or improve the **taste, appearance, and health** of drinking water, as well as the softeners and filters treating consumers' working, bathing, and “problem” water. Refrigerator and other appliance water filters are included, too.

Suppliers offer different business models (purchases vs. rental services, etc.), and different product types, capabilities, and operating costs. User interfaces, maintenance costs, and consumer “compliance” vary enormously, as does household penetration by country.

Covid, supply chain disruptions, geopolitical tensions, and wars have affected each country's market in different and sometimes surprising ways. For data and insights, *however*, **nothing beats Baytel's new 2024 “Global Markets” Study**:

- ¶ 50 country markets, each independently analyzed
- ¶ Separate coverage of **drinking water vs. water conditioning** products, **by type**
- ¶ **Systems and Aftermarkets** (cartridges, media, service) **separately quantified**
- ¶ **Regional and Global** analyses
- ¶ Hundreds of tables, graphs, figures, photos
- ¶ **Insightful 2- and 5-year market projections**

Email mattmoes@baytel.org TODAY for a detailed prospectus!