
NEWS FROM BAYTEL ASSOCIATES

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A CHANGING GLOBAL MARKET FOR HOME WATER TREATMENT PRODUCTS

Ocean Grove, New Jersey, USA

FOR IMMEDIATE RELEASE

Home water treatment products and services compete with bottled water and complement 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!**

As utility tap water becomes potable in any given country, however, **that market undergoes a period of transition as trust on the part consumers develops**, the current situation in **Korea being a case in point.**

For 40 years, Baytel Associates, has explored the technologies and markets for 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, Samsung, and Whirlpool, **beverage giants** like Coca-Cola, Danone, Nestle, and PepsiCo, **private equity giants** like Advent International, BDT Capital, Bain Capital, and **others** including: Amway, Asahi Kasei (Crystal IS), Brita, BWT, ChungHo, Clorox, Coway, Cuckoo, Culligan International, DuPont Water Solutions, Electrolux, Eureka Forbes (Advent), Helen of Troy (Pur), IAPMO, Lixil, Marmon Water (Ecowater, KX, Graver), Mitsubishi, NSF International, Nikkiso (Aquisense), Panasonic, Pentair, Pollet, Strauss, Toray, WQA, and Solventum (the \$8+ billion 3M spin-off).

Every three years or so, Baytel updates its Global Markets report comparing **50 country markets in 10 regions** for home water treatment products that filter, purify, disinfect, heat, chill, carbonate, mineralize, optimize, and adjust pH, improving 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 **very 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, tariffs, 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 2025 "Global Markets" Study:

- ¶ The **Global** analysis includes **10 Regional analyses** and the **Global Totals**
- ¶ **50 country markets**, each **independently analyzed**
- ¶ Separate coverage of **drinking water vs. water conditioning products, by type**
- ¶ **Insightful market projections, trends, and comparisons**
- ¶ **Systems and Aftermarkets** (cartridges, media, service) are **separately quantified** reflecting the installed base (degree of household penetration) in each country's market
- ¶ **Hundreds** of **tables, graphs, figures, & photos**

For more information email, call, or leave a message for **Matt Moes** at Baytel's USA office:
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