

**GOING
OUTSIDE**

For
information,
insights and
strategy

*in the home water
availability, treatment
and storage business*

**WHAT TO LOOK FOR
WHERE TO GO**

1. You're interested in the **global market** for home water treatment products...
2. You're looking for the best **information**, **insights**, and **strategy recommendations**...
3. So where do you turn?

HERE'S WHAT ONE SMART, SUCCESSFUL COMPANY DID:



✓ "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.**"

— Matt Whitener
VP/General Manager Global Water Products
Emerson - InSinkErator

But don't just take one big company's word for it!

*Read on to explore how other **key players** in the industry have solved this problem...*

The World's Best Coverage

“Feet on the Ground” in 50+ Country Markets



- ✓ “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

Now DuPont Water Solutions



- ✓ “The feedback I received from all colleagues was VERY positive.”

— Head of Market Research
Brita GmbH

Referring to Baytel’s report, *The Global Market for Home Water Treatment Products & Services*



- ✓ “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 in accordance with your promises... **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.”

— Electrolux AB



- ✓ “Tks 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.”

— Unilever Pureit Team

A.O. Smith now owns Unilever’s Pureit business



“Out of the Box” Thinking



✓ *“Sounds like you have discovered a great idea.”*

— Whirlpool Corporation
formerly Global Director, Water Products



Separation & Purification



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

— 3M Separation and Purification Sciences
was spun off as part of Solventum



✓ “A fantastic analysis. I really appreciate the time you put into these insights.”

— Unilever Ventures



✓ “Endorsed for Strategy, Competitive Analysis, Market Research, Marketing, Product Development & Marketing, Product Management, and International Business.”

— Electrolux

Less Overhead, Better Value

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.”

— Monsanto



- ✓ “I had the privilege of working with Matt and his team on a number of market research initiatives investigating the global water and filtration industries. Matt’s professional and highly ethical approach makes working with him a true pleasure and highly rewarding. I would recommend Matt to anyone looking for guidance in the Water market.”

— VP/General Manager Global Water Products
Emerson - InSinkErator



- ✓ “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.”

— Andrew Warnes

Former Sr. Product Mngr & Senior Channel Mngr
PRF (a GE / Pentair JV)

Former International Director of the US Water Quality Association (WQA)
Serves as a member of the WC&P Technical Review Committee.



- ✓ “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.**”

— Yamaha Motor

Technically Savvy Analyses



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

— Robert Slovak

The "Father" of Residential RO in the U.S.A.



✓ *"An invaluable tool that will aid our strategic planning process"*

— President, Nimbus Water Systems

Nimbus offered the industry's first residential under-the-counter RO and continues to innovate.



✓ **"We invested in Inge GmbH and Baytel convinced us they could be of help prioritizing Inge's opportunities (globally). We were very happy with Baytel's analysis!"**

— Siemens Venture Capital



✓ *"Brings color to the numbers and a better understanding of the market"*

— Halosource



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

— President & CEO
Aquion

Knows All Distribution Channels

Direct Marketing, For Example



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

— Global Director of Durables
Amway



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

— Head of Water Team
Coway



- ✓ "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."

— Product & Research Director
Elken, Sdn. Bhd.



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

— Strauss Water Business Development

Crystal Clear Reports

With tons of Baytel photos taken in the field



✓ "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."

— Brita GmbH



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

— Sr. VP Business Strategies & Development
Kemflo International



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

— VP Strategic Projects
Waterlogic Consumer Products



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

— Torayvino Export Section
Toray Industries



✓ "You have good reports!"

— Global Product Manager, Water & Beverage
Whirlpool Corp.

Engaging Team Players!



✓ “Really helpful! Thanks for the follow up.”

— 3M Purification



✓ “Great work... You have been a good partner”

— Sr. VP International
Clorox



✓ “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!”

— Shaldor Strategy Consulting

Understands Cultural Differences



✓ “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.”

— NSF International
General Manager, Drinking Water Treatment Program

More than 40 Years Experience



- ✓ “A real credit to the Water Quality Industry—every manufacturer should buy a copy!”

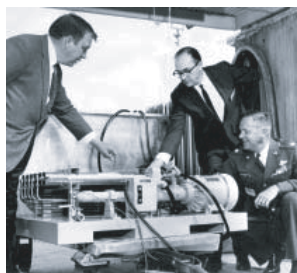
— Floyd R. Smith
(Former) Communications Director
EcoWater Systems



- ✓ “A well-written, comprehensive report that is accurate, readable, and utilizes excellent graphics.”

— Manager Corporate Development
Englehard Corporation

Englehard, a former American Fortune 500 company was acquired by BASF in 2006.



Donald Bray (center) and U.S. Air Force Colonel Peck review prototype RO system in the late 1960s.

- ✓ “I have just finished looking through your 1993 edition of The U.S. Home Drinking Water Treatment Market.” Quite frankly I’m impressed by the breadth and accuracy of the detail. Congratulate whoever is responsible.

— Donald T. Bray
President, Desalination Systems

Donald Bray invented spiral-wound membrane elements and his company, Desalination Systems, was the first to produce them commercially. He later sold Desalinations Systems to Osmonics (now part of GE).



- ✓ “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.”

— (Former) Marketing Manager,
Ametek Inc., Plymouth Products Div.

Ametek’s Plymouth Products Division was a major international supplier of filters and filter housings. The company had a very broad line and supplied many OEMs.

More than 40 Years Experience

✓ “The most complete source of industry information available.”



— Business Manager, Filtration
Teledyne Water Pik

Teledyne Water Pik was a major U.S. manufacturer of dental systems, shower products, and air and water treatment systems for the home.

✓ “Everything you could ever want to know about the industry — in one spot!”



— Group Product Manager
U.S. Marketing Department
Amway Corporation

✓ “We found the report thorough, on target, and the information provided will help us to make decisions in the category.”



— Director
Kenwood Appliances

Kenwood was a leading European manufacturer and supplier of kitchen appliances, including mixers, kettles, toasters, steam irons, and electronic water filters with sales in 80 countries.

✓ “A sophisticated analysis of a complicated market. Must reading for any executive who's serious about the drinking water business.”



—(Former) Water Group Manager
SHURflo

SHURflo was one of the original major manufacturers of boost pumps for residential RO systems. It merged with Wicor, which became part of Pentair.

✓ “Very thorough. A thoughtful approach!”



— Former Market Area Manager
Rohm and Haas

Rohm and Haas is now part of DuPont. It was a major global supplier of specialty chemicals, including water treatment resins.

Baytel

Associates

THE CHOICE OF INDUSTRY INSIDERS

Baytel has provided services to a number of large Private Equity Firms including:

"Thanks for all the hard work over the last several months. Hope your travels to Europe went well! Over the past couple of weeks, both the **Culligan** and **Advent** side have spent time going over Baytel's market sizing work in detail. Overall, the work is great and will be very valuable to us as we move forward."

Advent International
GLOBAL PRIVATE EQUITY

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WHAT CAN WE DO
FOR YOU?



Our Current Coverage



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

STATEMENT OF CAPABILITIES

For more than 30 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
(Now part of DuPont Water Solutions)

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