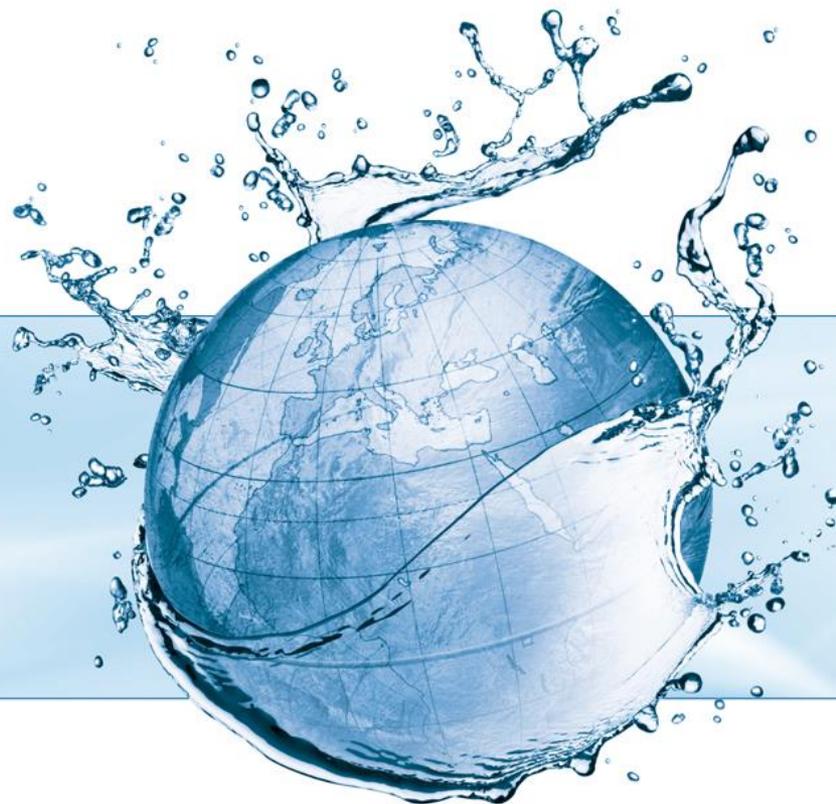


For You and Planet Blue.

Company Presentation

Export Meeting – Deauville May 2014

D.Boucly



For You and Planet Blue.

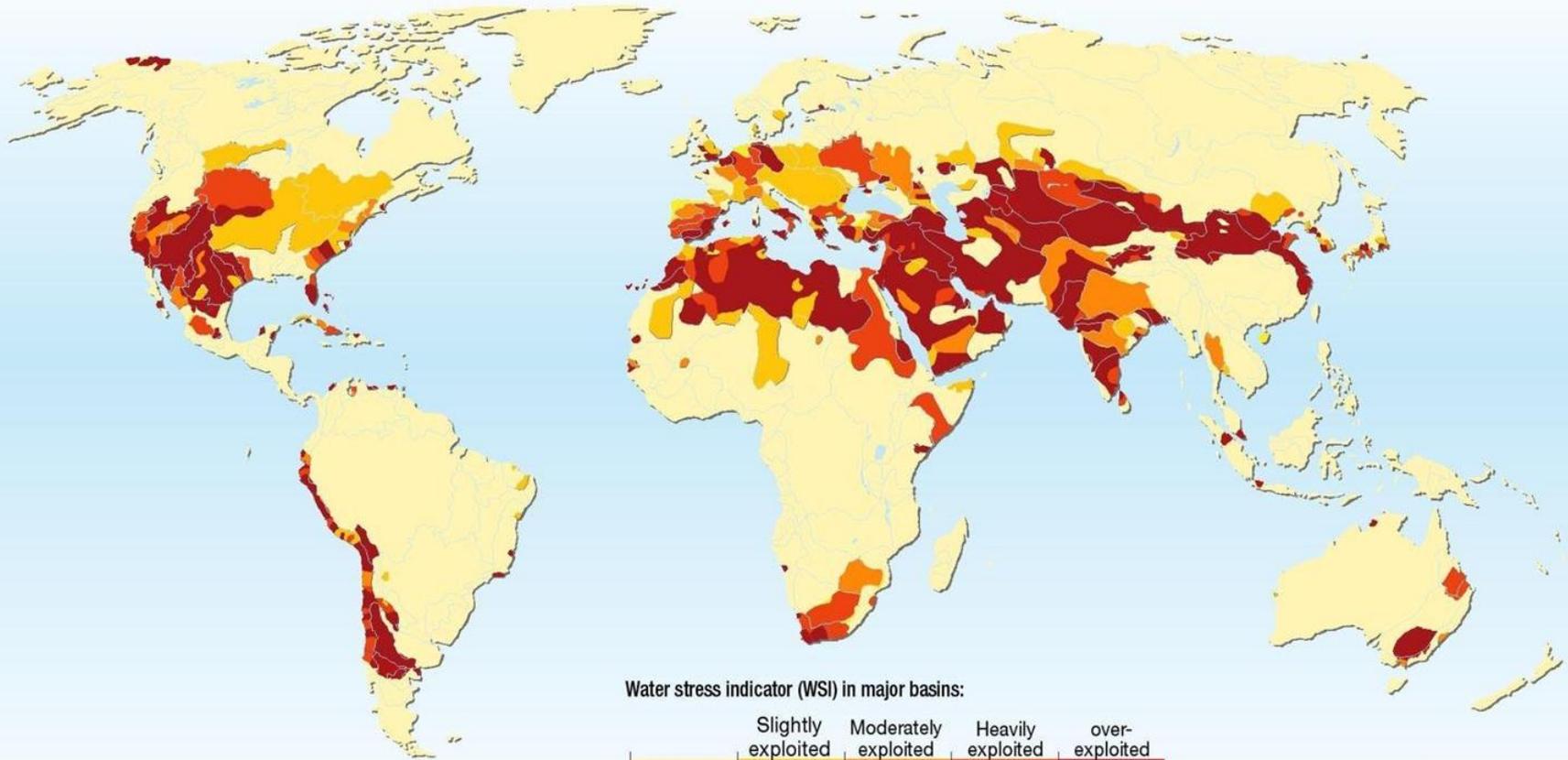


**There are alternatives to energy,
but there are no alternatives to water.**



For You and Planet Blue.





Water stress indicator (WSI) in major basins:



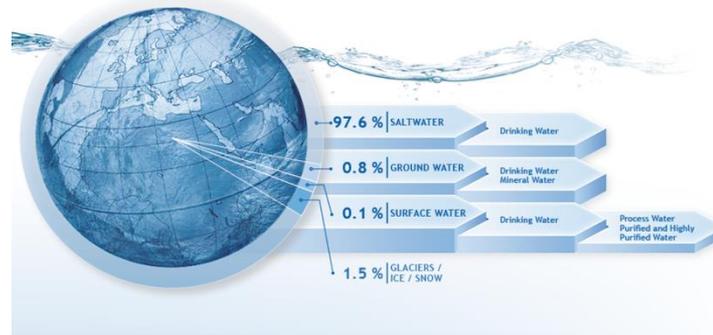
Sources: Smakhtin, Revenga and Döll, 2004.

PHILIPPE REKACEWICZ
FEBRUARY 2002

Source: Assessing Water Risks, WWF 2011,
Philippe Rekacewicz, February 2006,
<http://maps.grida.no/go/graphic/water-scarcity-index>

- **“Water consumption has increased six-fold over the last century and will double again by 2050.”**
- **“The supply of fresh water will become a critical factor for the global economy.”**
- **“Water crises, long regarded as a problem for the poorest of the poor, now affect even the richest countries.”**
- **“Innovative small water treatment systems will become the norm.”**

Everyday we are researching, developing and working on innovative solutions for the treatment of 98.5 % of the world's water.



You'll find BWT nearly everywhere you find water:

- Drinking water
- Mineral water
- Ultra-pure water for the pharmaceutical industry
- Water for swimming pools
- Heating water
- Process water
- Boiler and cooling water
- Water in air conditioning systems



BWT – The Internationally Leading Water Technology Group.

BWT – The Company



For You and Planet Blue.



Company History

- 
- 1823
Founded by A. Benckiser in Schriesheim, Germany
 - 1949
Foundation of Mondseer Armaturen
 - 1981
Acquisition of Cillichemie Vogelmann
 - 1983
Acquisition of Mondseer Armaturen
 - 1985
Acquisition of Permo Water Treatment
 - 1990
Management Buy Out of Best Water Technology Group
 - 1992
Flotation on the Vienna Stock Exchange
 - 1996
Acquisition of Aqua France
 - 1997
Acquisition of FuMA-Tech
 - 2003
Acquisition of the HOH Group (Denmark, Finland, Norway, Sweden)
 - 2004
Acquisition of Benchem
 - 2005
Foundation of BWT water + more
 - 2006
Foundation of BWT Shanghai, acquisition of Anna
 - 2007
Foundation of BWT Ukraine
 - 2008
Foundation of BWT Russia, foundation of BWT Nederland
 - 2009
Acquisition of CHRIST Pharma & Life Sciences
 - 2010
Takeover of Culligan UK
 - 2011–2013
Launch of BWT Consumer Strategy
 - Infrastructure Investment Programme

The Leading International Water Technology Group.

- 
- 4 production facilities
 - 500 million turnover
 - 2,800 employees
 - R&D departments in France, Germany, Switzerland and Austria
 - Germany and France are the export companies
 - Globally leading know-how in all areas of water treatment

BWT offers a wide sales and service network with more than 2,800 employees in our European partner network.

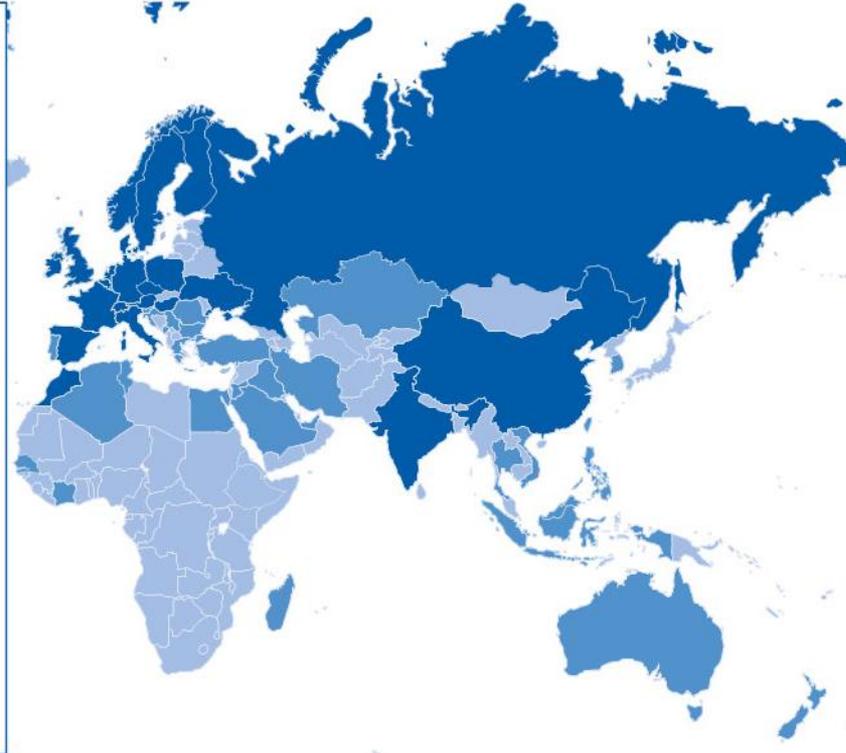
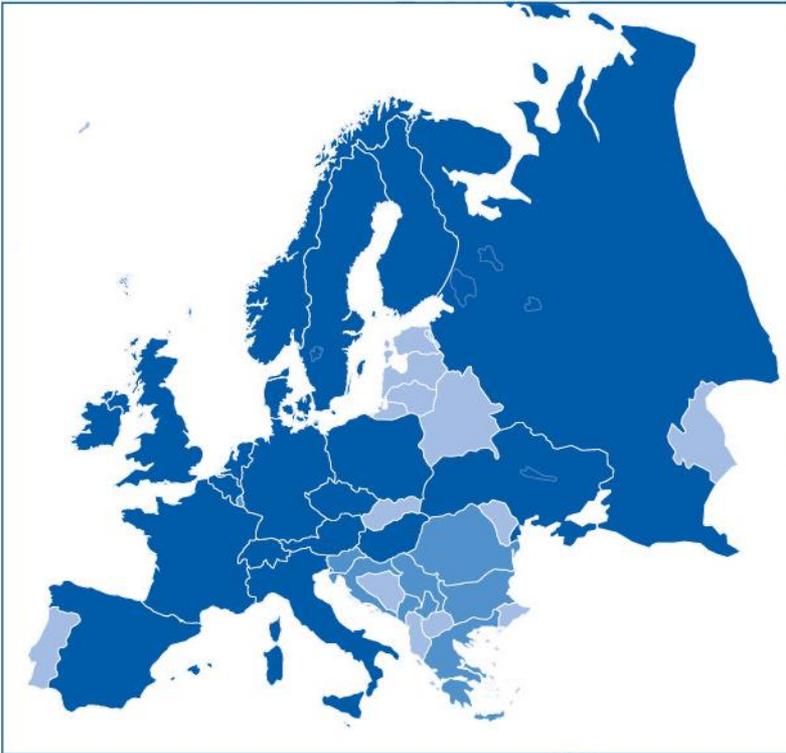


BWT Subsidiaries

For You and Planet Blue.



- Austria
- Belgium
- China
- Czech Republic
- Denmark
- Germany
- Finland
- France
- Great Britain and Northern Ireland
- Holland
- Hungary
- Ireland
- Italy
- La Reunion (Indian Ocean)
- Malta
- Morocco
- Norway
- Poland
- Russia
- Sweden
- Switzerland
- Spain
- Ukraine



BWT Partner Companies

For You and Planet Blue.



NORTH- and SOUTH AMERICA

Canada
Mexico
Panama

EUROPE

Bulgaria
Croatia
Greece
Luxembourg
Montenegro

Romania ❤️

Scandinavia

Serbia

Slovenia

Switzerland

Turkey ❤️

AFRICA

Algeria ❤️

Egypt

Ivory Coast ❤️

Madagascar

Mauritius ❤️

Senegal ❤️

Tunisia ❤️

MIDDLE EAST

Iran

❤️ **Iraq**

Jordan

Kuwait

Lebanon

❤️ **Palestine**

Qatar

Saudi Arabia

Syria

UAE

West Bank

ASIA

China

Indonesia

Malaysia

New Caledonia

Philippines

Polynesia

Singapore

South Korea

Thailand

Vietnam

AUSTRALIA

❤️ **New Caledonia**



- **120 employees** in Research & Development: Chemists, physicists, chemical engineers, process engineers, mechanical engineers, microbiologists
- **R&D-facilities** in Germany, France, Switzerland and Austria
- **R&D emphasis:** Filtration, filter media, ion exchange, softening, decarbonisation, membrane technologies, reverse osmosis, nanofiltration, microfiltration, ultrafiltration, pure steam generation, ultrapure water distillation, UV-systems, ozone technologies, ion exchange membranes, electrolysis systems, electrodialysis, electro-deionisation, chlorine dioxide generation, dosing pumps
- **Fuel Cell Membranes**





“Point of Entry” Products



For You and Planet Blue.



Filtration

For You and Planet Blue.



Softening

For You and Planet Blue.



Softening

For You and Planet Blue.



Limescale Protection AQA total

For You and Planet Blue.



Reverse Osmosis PERMAQ



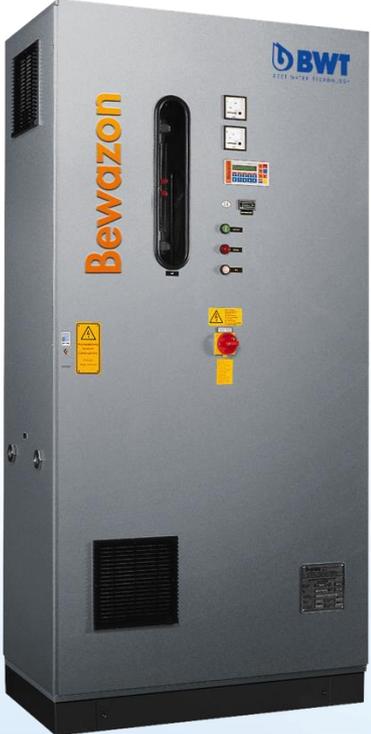
Reverse Osmosis & Electro-deionisation

For You and Planet Blue.



UV- & Ozone-Disinfection

For You and Planet Blue.



Seawater Desalination

For You and Planet Blue.





BWT OSMOTRON PRO PW

PW Production Systems

OSMOTRON is the world's most popular skid-mounted water treatment system for the production of PW / HPW

- premium energy efficiency
- excellent ergonomics
- compact hygienic design
- full hot water sanitisation >80°C
- highest operational safety

BWT OSMOTRON PRO HPW

HPW Production Systems

With integrated SEPTRON BIOSAFE UF technology, OSMOTRON systems offer HPW quality according to European Pharmacopoeia, including all advantages of the OSMOTRON PRO PW series and additional microbiological security

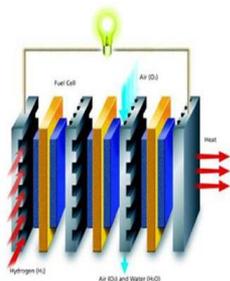
- integrated compact EDI/UF technology

Filtration and filter media with patented processes for

- Manganese removal
- Arsenic removal
- Uranium removal
- Nickel removal
- Fluoride removal
- CIP-disinfection

The BWT-powered beverage producer





fumatech
Funktionelle Membranen und Anlagentechnologie

BWT and Fuel Cells

Fuel Cells



The new 'Zero Emission' motorsport-class fuel cell with BWTfuMA Tech membrane power 'inside' the FORZE VI.

- A clean and efficient power generation technology
- Central element on the way to a Low Carbon Economy: reducing emissions, diversifying energy mix and increasing safety
- Ionomer- and membrane supplier for Membrane-Electrode-Assembly (MEA)- and stack producers
- Growth for electric cars, power storage devices, electrolysis and special applications due to stricter environmental policies

“Point of Use” Products



For You and Planet Blue.



Classic PoU Products

For You and Planet Blue.



PoU Ware Washing

For You and Planet Blue.



BWT bestmax
best water technology

BWT bestmax PREMIUM
best water technology

BWT bestmax BALANCE
best water technology



Penguin 2.7 L Colour Edition





Classic Edition



Gourmet Edition Mg²⁺



Gourmet Edition Mg²⁺ /silver free



Safety Edition Anti-Arsen



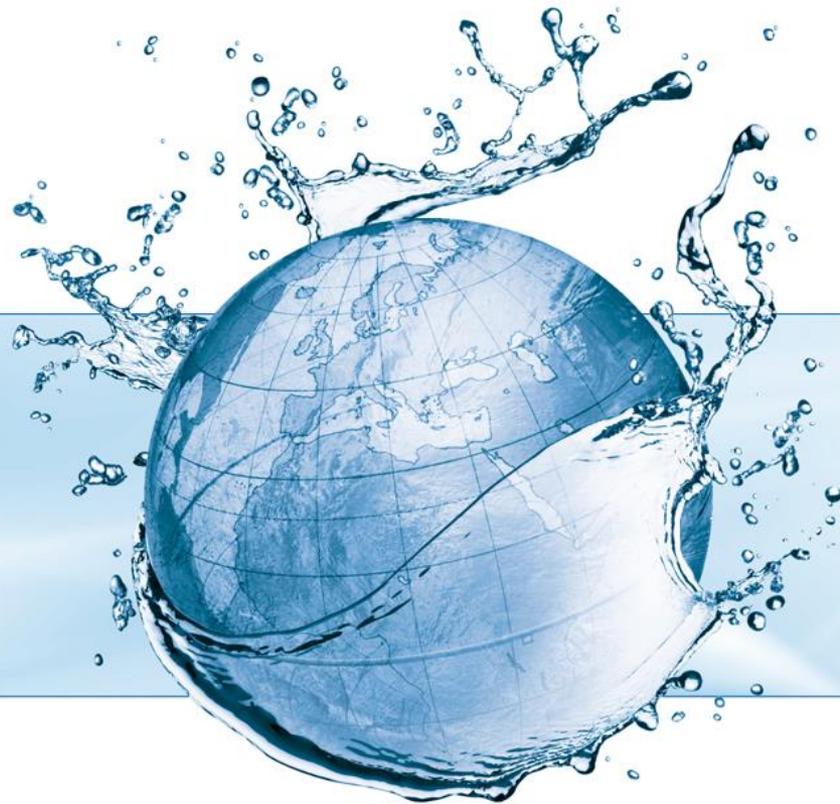
For You – our Customers and Partners

Innovative, economical and ecological technologies that deliver maximum safety, hygiene and health in their daily contact with water.

**YOUR PARTNER NO. 1
CONCERNING WATER!**



A bit more about BWT France

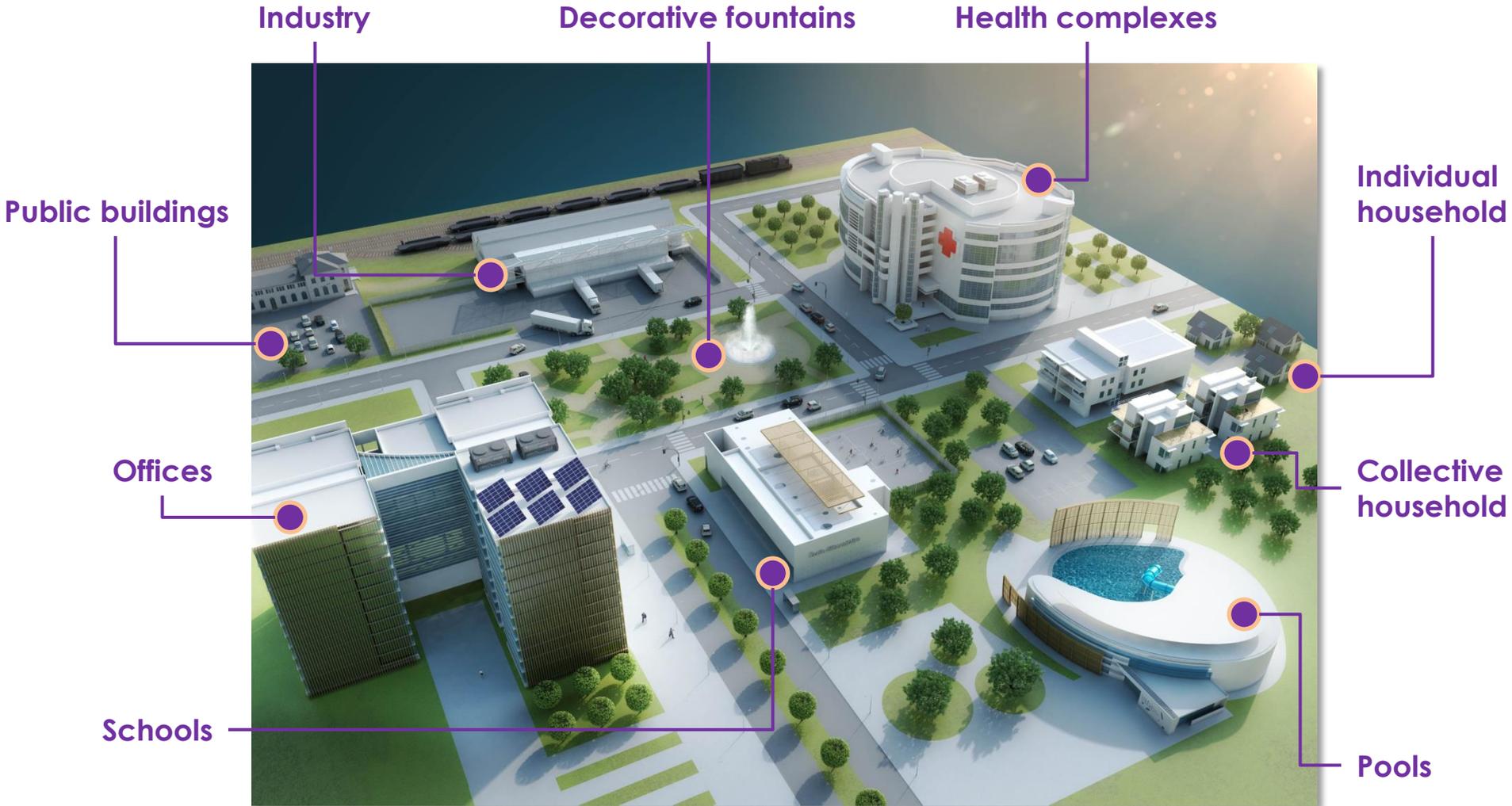


For You and Planet Blue.



Our mission

For You and Planet Blue.



BWT water is everywhere



Drinking water

- cold water
- hot water



"Climatic" water

- heating
- iced water
- cooling towers
- humidification
- spraying



Pool water

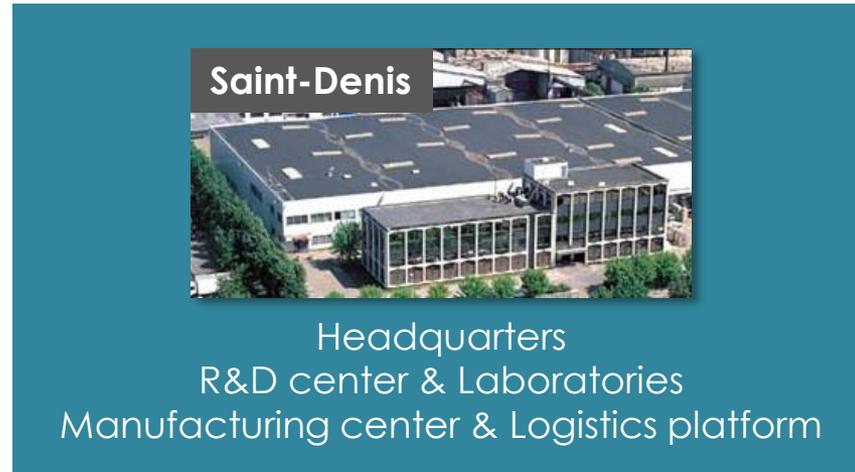
- public pools
- private pools
- spas, thalasso
- bath therapy



Process water

- steam boilers
- food & beverage, pharmacy, etc.
- cleaning
- sterilization
- dialysis
- disposal water

580 employees - 100 M€ turnover



BWT
BEST WATER TECHNOLOGY
BWT PERMO
12 agencies

Cillit
Traitement de l'eau
6 agencies

Five networks
covering the
national area

CPED
Traitement de l'eau

8 agents



50 technicians

BWT
water + more

5 agents

BWT France on our markets

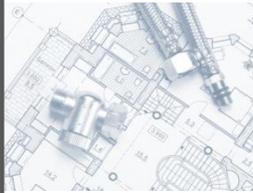
For You and Planet Blue.



-  BWT Permo
-  CILLIT
-  CPED
-  CPS
-  BWT water +more



catalogue products



custom-made solutions



chemicals



service

individual household



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commercial markets



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industry



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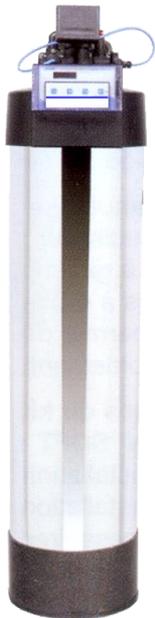
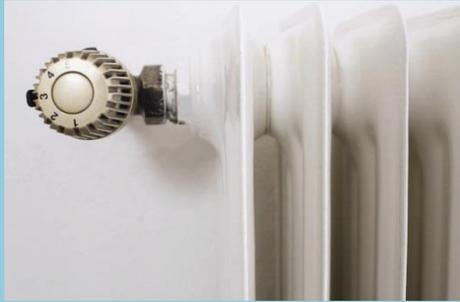
- 



anti-scale rinsing filter – filtration unit – softener – electronic anti-scale device



filtering jug adding magnesium – coffee machine filter - purifier



commercial softener – desludging unit – chemicals for closed loop circuits



pool filter – UV generator – chlorine injection unit – disinfectant on site generators



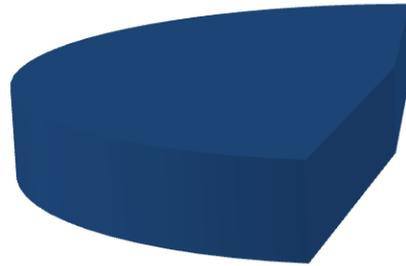
cartridge filter – compact R.O. unit – R.O. unit on chassis – chemicals in *Bag-in-Box*



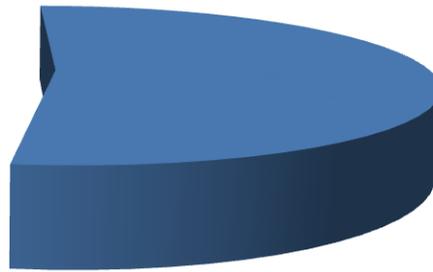
Responsible Care[®]
OUR COMMITMENT TO SUSTAINABILITY



T/O 2013



France
8.151 K€



Germany
8.944 K€



3,5% of the total Group turnover → Margin for improvement

Necessity to develop the business together with our partners



We need you !!!

Focus on Export business

For You and Planet Blue.



Sales 2013 (M€)	France	Germany
DT	0,4	4,4
CT	1,1	1,7
CH	1,1	0,2
PT	0,2	-
PE	5,0	0,1
PoU	-	1,3
SE/SR	1,1	0,4
TOTAL	8,9	8,1

Comparable sizes but different business models

Sales 2013 (M€)	France	Germany
Industry	6,7	-
Installers	1,2	0,2
Indirect Dist.	-	7,2
Others	1,0	0,7
Total	8,9	8,1



There is probably room for developing other activities in your respective countries

To thank the French International dream team

For their availability, their engagement, their friendship, their passion for their business and their customers !

I wish them a very good, positive and constructive year !





 **BWT**
BEST WATER TECHNOLOGY

For You and Planet Blue.