

# 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.**

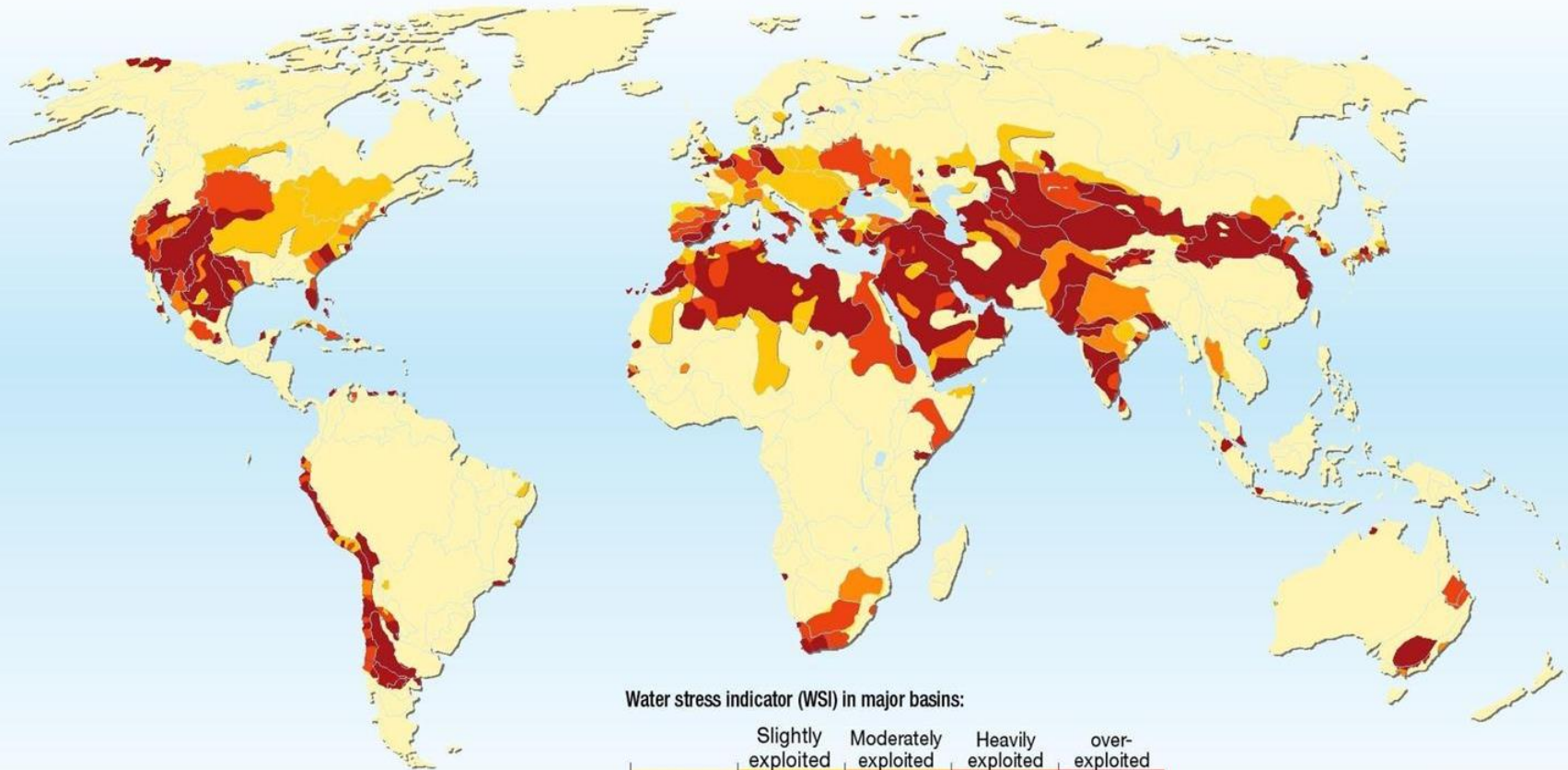


For You and Planet Blue.

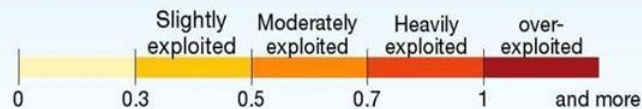


# Freshwater Stress

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Water stress indicator (WSI) in major basins:



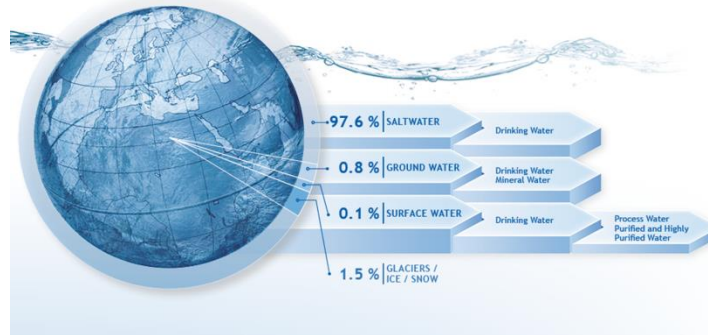
Sources: Smakhtin, Revenga and Döll, 2004.

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.

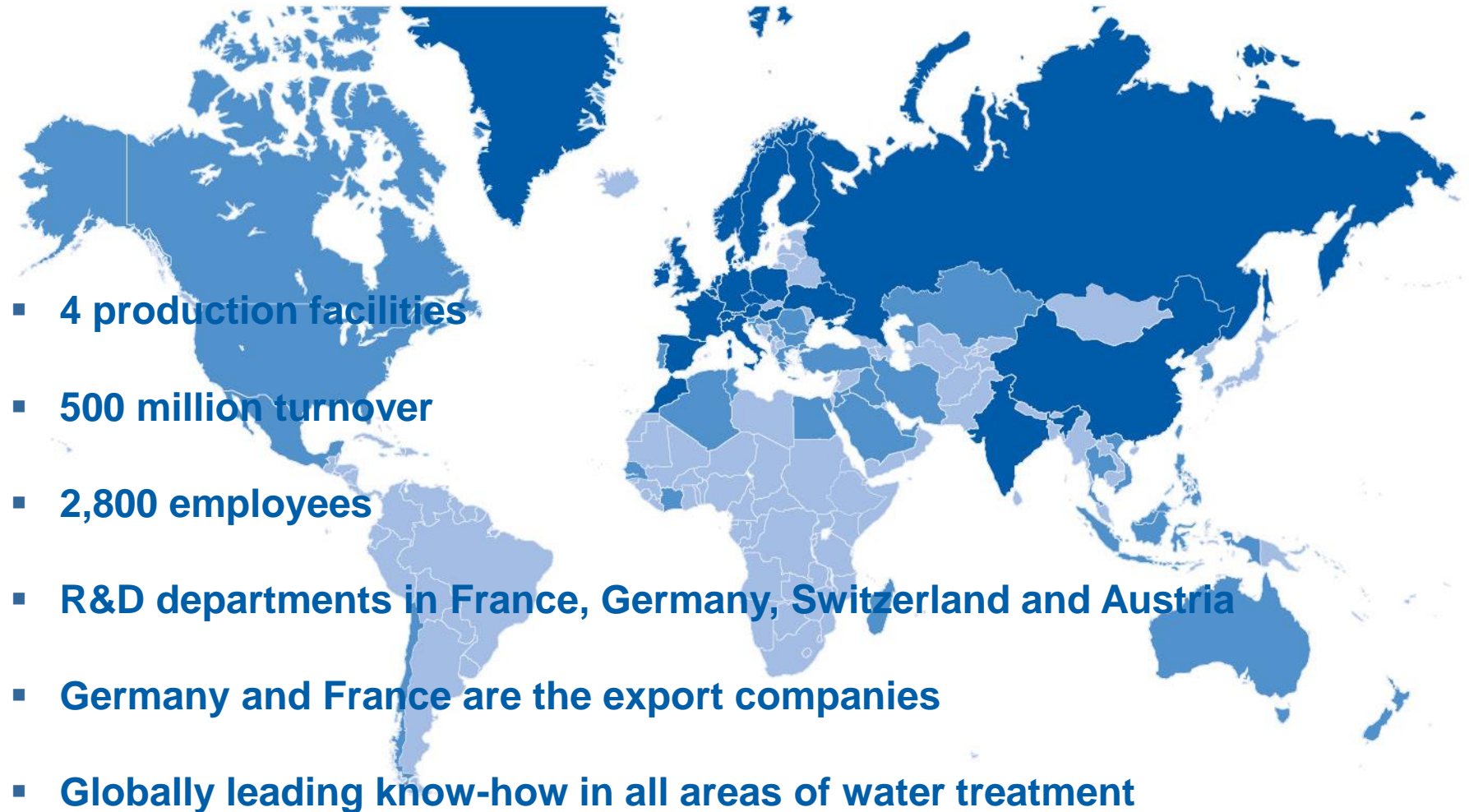


## Company History

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- **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

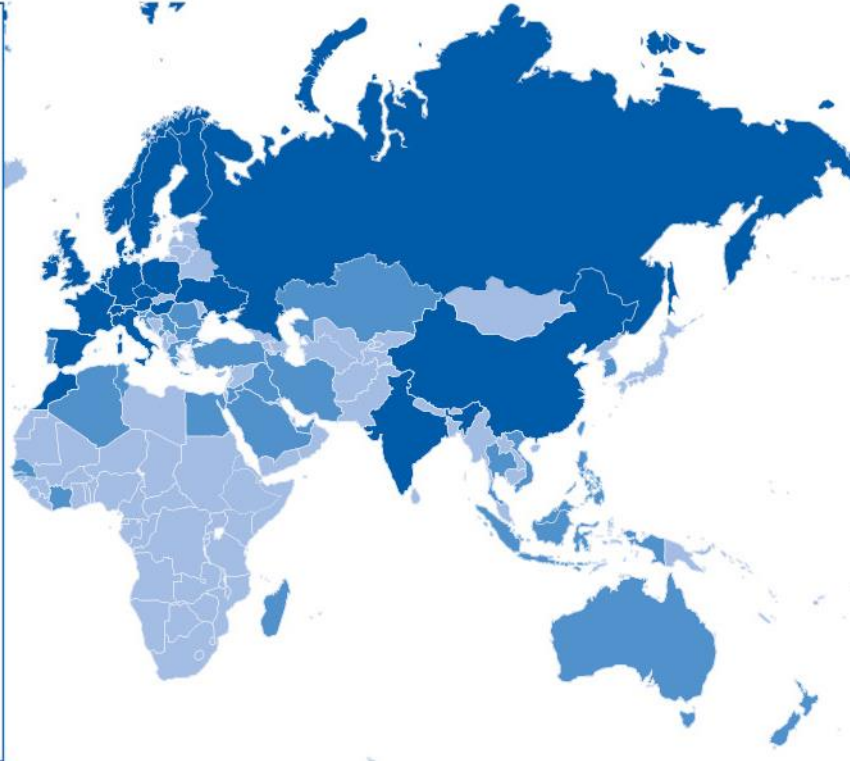
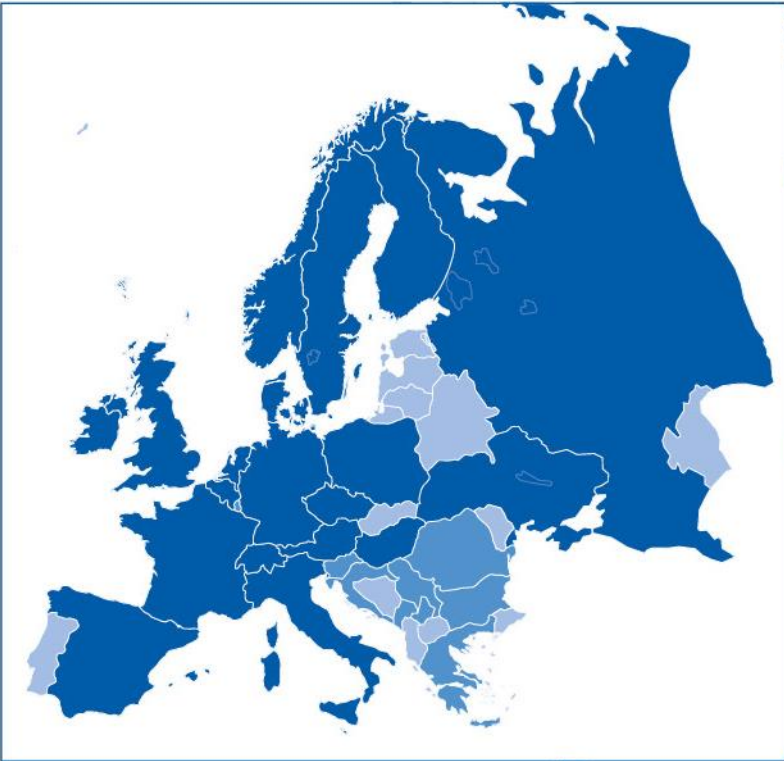


## The Leading International Water Technology Group.

- 
- A world map with various countries highlighted in blue, indicating BWT's global presence. The highlighted areas include North America (USA, Canada), parts of Europe (France, Germany, Switzerland, Austria), and several countries in Africa, Asia, and South America.
- 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.**





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

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# Softening

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# Softening

For You and Planet Blue.



# Limescale Protection AQA total

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# Reverse Osmosis PERMAQ

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# Reverse Osmosis & Electro-deionisation

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# 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



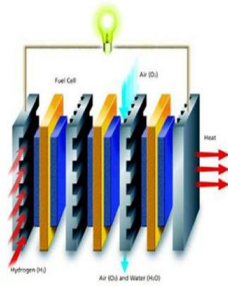
## Filtration and filter media with patented processes for

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

### The BWT-powered beverage producer



## Fuel Cells



**fumatech**  
Funktionelle Membranen und Anlagentechnologie

## BWT and Fuel Cells



The new 'Zero Emission' motorsportclass fuel cell with BWTfuMA Tech membrane power 'inside' the FORZE VL.

- 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

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# PoU Ware Washing

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**BWT bestmax**  
best water technology

**BWT bestmax**  
best water technology **PREMIUM**

**BWT bestmax**  
best water technology **BALANCE**





## Penguin 2.7 L Colour Edition



# BWT Filter Cartridges

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**Classic Edition**



**Gourmet Edition Mg<sup>2+</sup>**



**Gourmet Edition Mg<sup>2+</sup>/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

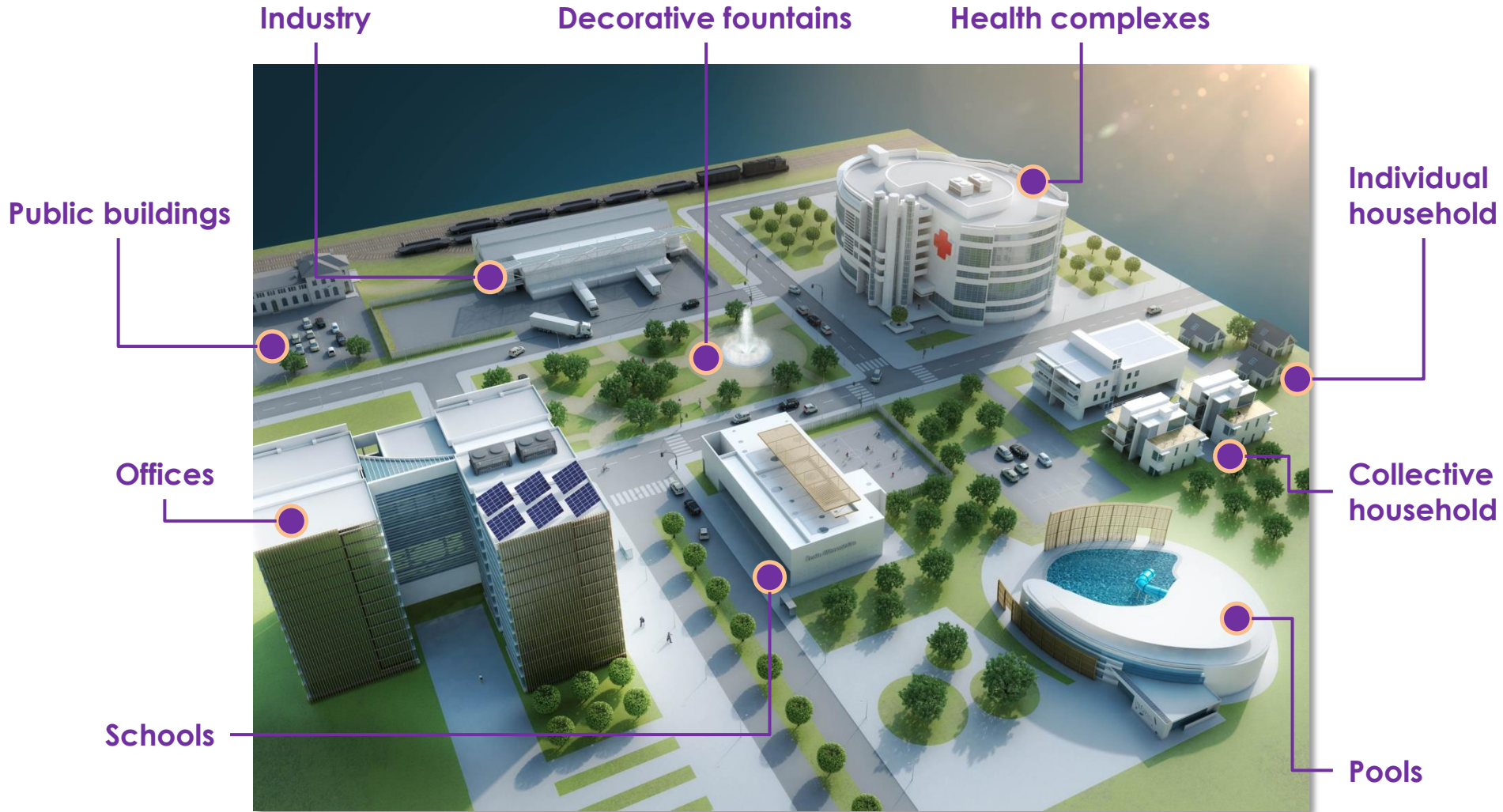


For You and Planet Blue.



# 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



Saint-Denis

Headquarters  
R&D center & Laboratories  
Manufacturing center & Logistics platform

**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

**CPS**  
Service  
50 technicians

**BWT**  
water + more  
5 agents

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




catalogue  
products



custom-made  
solutions







chemicals










service





individual household



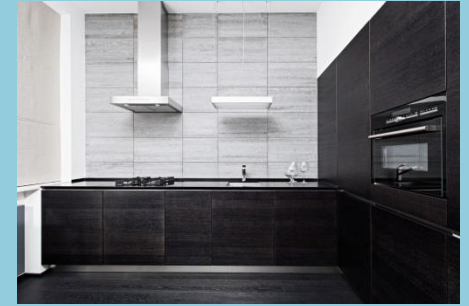
commercial markets



industry



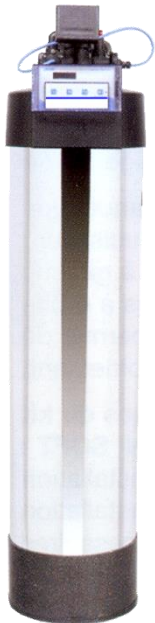




anti-scale rinsing filter – filtration unit – softener – electronic anti-scale device



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*

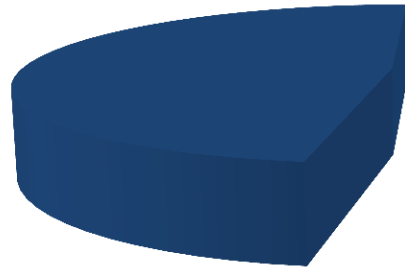


**Responsible Care**<sup>®</sup>  
OUR COMMITMENT TO SUSTAINABILITY

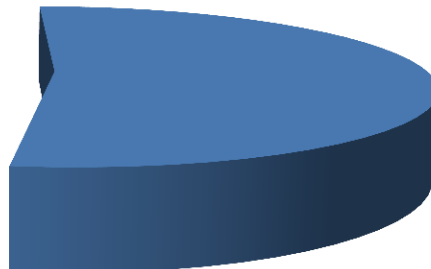




## T/O 2013



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



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

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

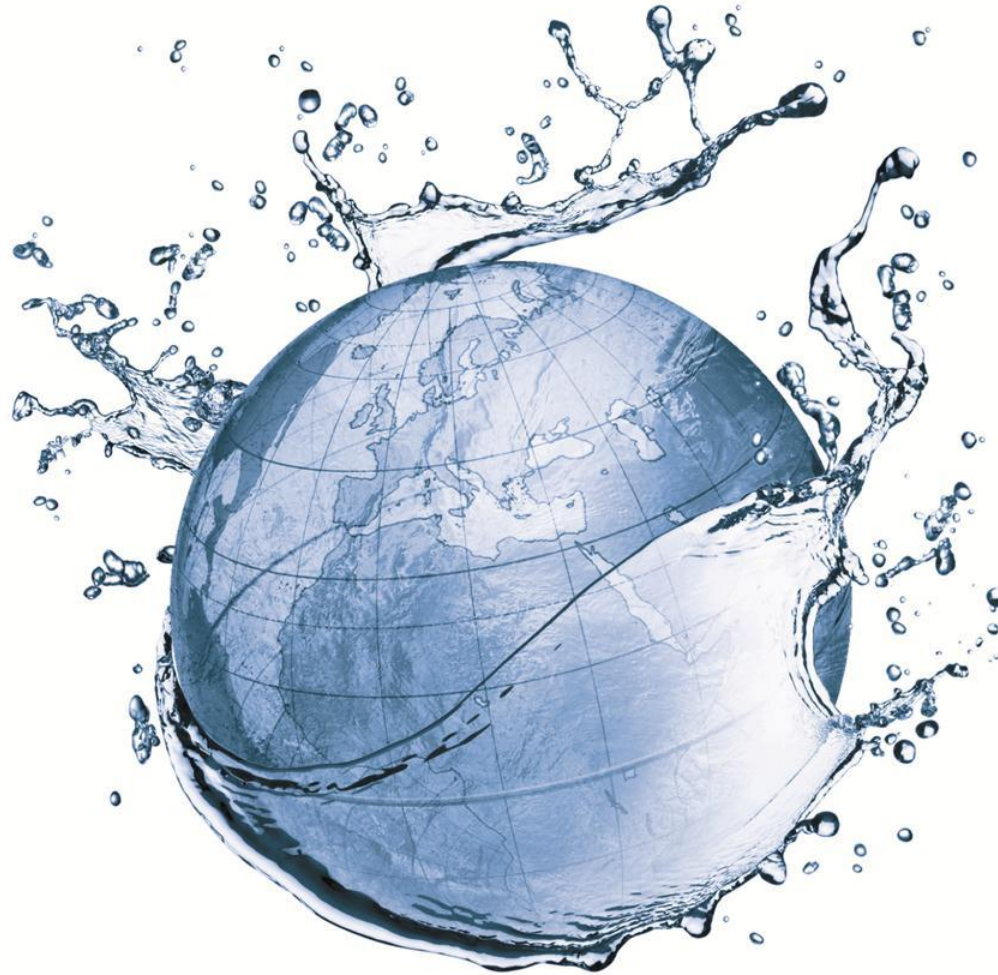
To thank the French International dream team ....

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 !







For You and Planet Blue.