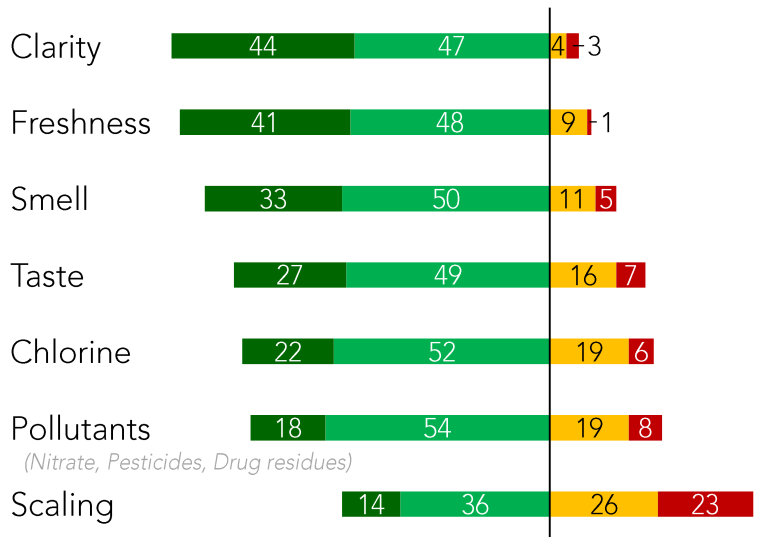
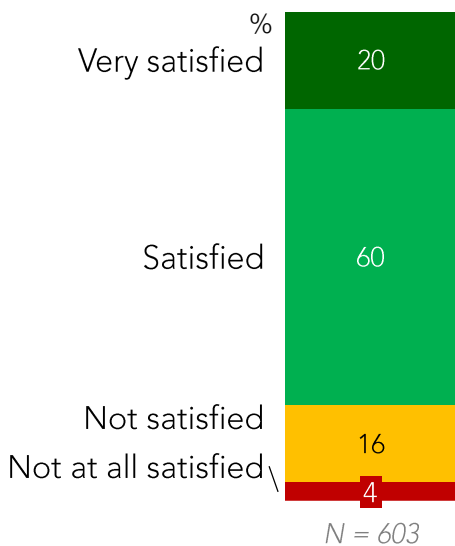


POSITIVE PERCEPTION OF WATER QUALITY

4 in 5 French homeowners are satisfied with their water quality, particularly its clarity, freshness and smell. Scaling is the major issue with 50% unsatisfied.



LIMITED PENETRATION OF RESIDENTIAL WATER TREATMENT EQUIPMENT

Only 1 in 4 households is equipped with residential water treatment equipment. 36% still only consume bottled water, spending an average of 24€ monthly.

Equipped with a solution



Only consume bottled water



Average monthly spending on bottled water

"There is no communication, We have to find information on these types of products on our own."

*Focus on softeners & filters

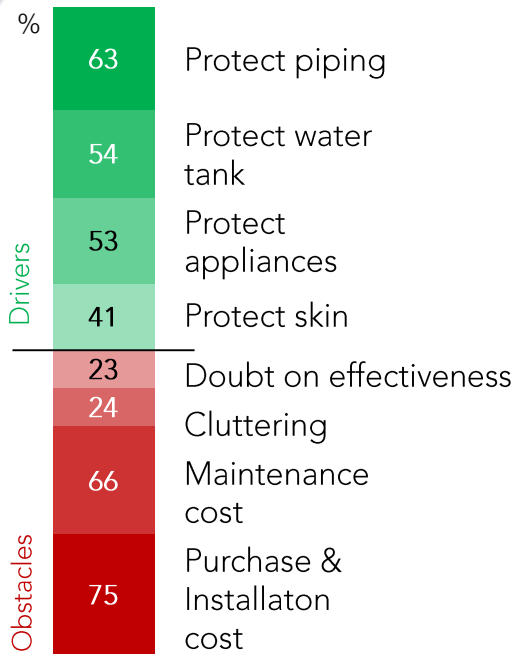
KEY PURCHASE DRIVERS & OBSTACLES

Softeners provide a rounded solution to tackle scaling whilst filters are acquired to improve drinking water quality. High purchase, installation and maintenance costs are the main hindrances to purchasing water treatment equipment.



Softeners

N = 604



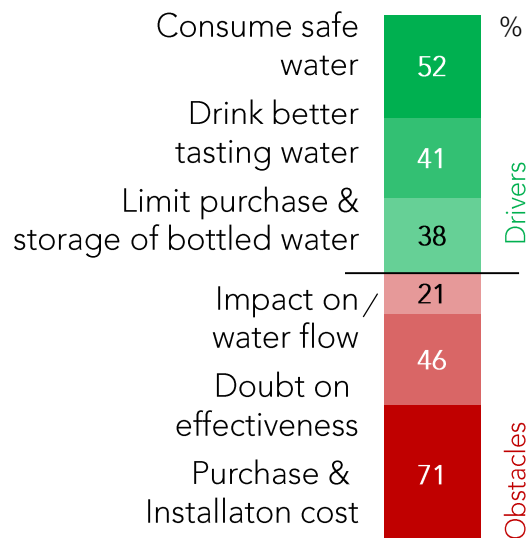
"We had issues with our washing machine, it was full of limestone. We had to set up a softener"

"I know it's very expensive, like maybe 500€ just for the equipment. Then for installation you double the cost."

Filters



N = 604



"I think filters under a sink are less constraining, easier to install and cheaper. And no need for someone to come every year for maintenance"

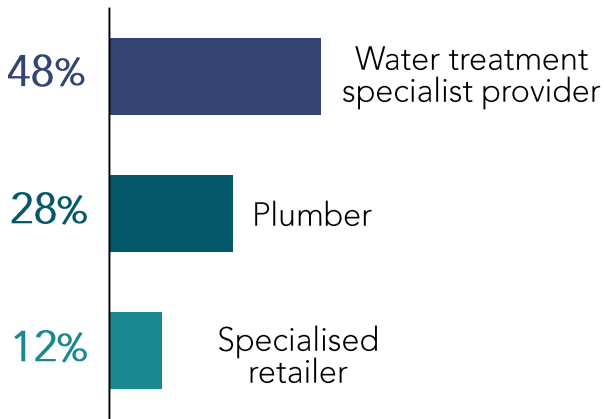
"I have friends who used it but it wasn't effective and costly to put on every tap so finally, they though that a point of entry softener was way better."

PREFERRED PURCHASING METHOD

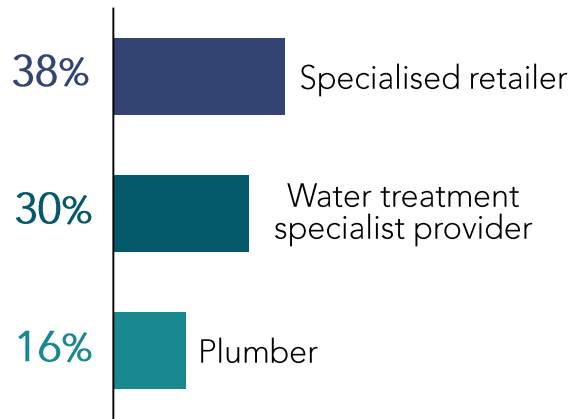
Direct purchase from companies specialised in water treatment is the main channel, however plumbers and specialised retailers are becoming increasingly popular.



Softeners



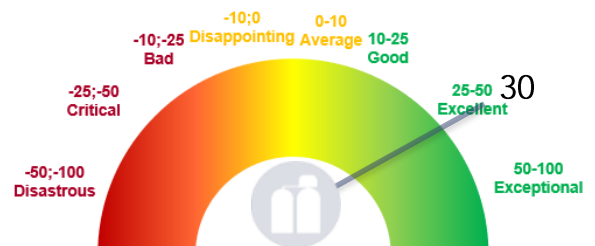
Filters



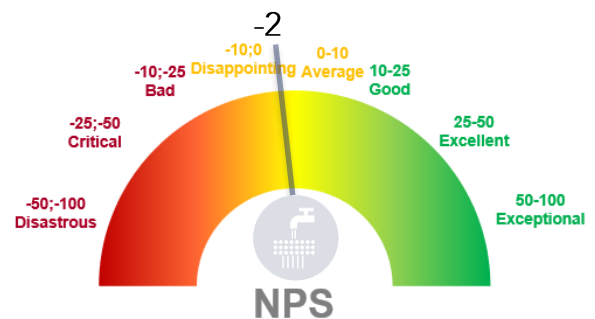
HIGH SATISFACTION WITH RESIDENTIAL WATER TREATMENT EQUIPMENT

A vast majority of respondents would repeat their purchase, especially for softeners, which also comes highly recommended based on its 'Excellent' Net Promoter Score (NPS).

Would purchase a softener again



Would purchase a sink filter again



NPS = % promoters - % detractors

ABOUT THE ANALYSIS

Amane Advisors, in collaboration with QualiQuanti, conducted:

- A quantitative analysis of 604 survey results from French homeowners responsible for their water installation
- A qualitative analysis of interviews done with 5 homeowners and 5 executives of UAE member companies

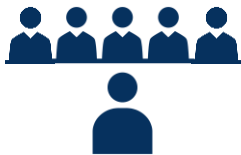
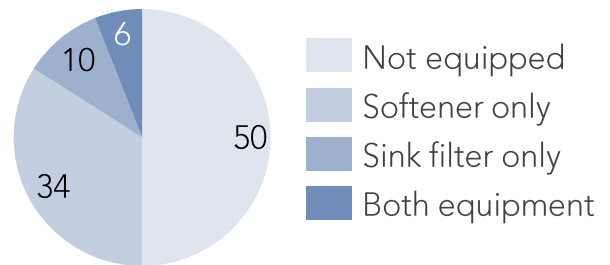


Survey with N=604 homeowners

Methodology:

Online survey with 63 questions, primarily close-ended (MCQs or multiple answers)

Breakdown of respondents based on equipment owned (%)



N=10 qualitative interviews with homeowners and industry executives

Methodology:

1-hour phone interview with open-ended questions. Semi-directive in nature (options provided to interviewee on some occasions)

ABOUT AMANE ADVISORS

Helping you navigate the water business

- Amane Advisors is a leading advisory firm dedicated to the water industry, with services including strategy, market intelligence, commercialization, M&A and PPP Advisory.
- In Market Intelligence, we turn water industry data and analytics into insights to anticipate the market and gain competitive edge.



Thierry Noel, Founding Partner
 tnoel@amaneadvisors.com
 +33 6 15 72 87 19
 Paris