



Federal Republic of Germany

Water & Waste Water Market Brief 2012

Federal Republic of Germany: Important Links & Contacts

Ministry of Environment – www.bmu.de

Ministry of Agriculture – www.bmelv.de

German Association of Energy and Water Industries – BDEW - www.bdew.de

German Association for Water, Wastewater and Waste – DWA - www.dwa.de

Association of Local Utilities – VKU - www.vku.de

German Technical and Scientific Association for Gas and Water – DVGW - www.dvgw.de



Market Overview

The German water supply and wastewater disposal industry has to adhere to stringent standards in terms of efficiency, security, quality of supply, disposal, and sustainability. While water supply and wastewater at the core of municipalities' public services, Germany has a pluralistic supply and disposal structure with public and private companies active in this sector. In total, there are approximately 6,211 water supply utilities in Germany. However, more than half of the drinking water is supplied by only about 100 large corporations (less than 2 % of the total number of companies) mainly serving major metropolitan areas.

In contrast to drinking water supply, wastewater disposal is dominated by public enterprises: wastewater disposal is seen as an obligation of municipalities. In total, there are more than 6,900 wastewater disposal enterprises in Germany.

The degree of connection of private households and industry to the public water supply is above 99 percent. The total length of the drinking water network in Germany is estimated at 530,000 km (not taking house connections into account.) 95 percent of the population are connected to sewage treatment plants meeting highest EU standards (biological wastewater treatment with nutrient elimination, "3rd purification stage".)

Wastewater of households which are not connected to central wastewater systems is treated by decentralized sewage purification plants. Hence, the degree of connection to wastewater treatment comes up to almost 100 %. The length of the German public sewage network totals approximately 540,000 km. In addition, there are about 66,000 storm water drainage systems. The volume of sewage sludge amounts to around 2 million tons. Due to demographic developments and further increase in water efficiency measures and water-saving appliances, stagnating or slightly decreasing volumes are expected for the future.

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Highlight Box

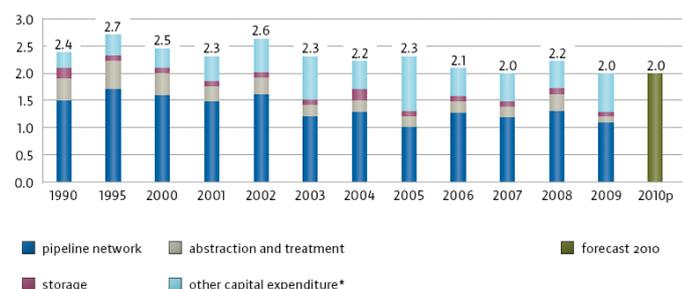
The German water and wastewater industry maintains high standards and has by far less water losses than other European countries.

The market is very fragmented with many local suppliers.

Prices for both potable water and wastewater in Germany are high compared to other European countries leading to further water-saving measures and appliances.

Development of capital expenditure in public water supply from 1990 to 2010

according to asset areas, in billion Euro



* other capital expenditure = meters and measuring devices, and capital expenditure which cannot be broken down into asset areas.

Source: BDEW Water Statistics