

Water & Waste Water Market Brief 2008

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 and disposal, and sustainability. While water supply and wastewater disposal are considered to be of general interest and as such are 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 6,400 water supply utilities in Germany. However, more than half of the drinking water is supplied by only about 100 large corporations (about 1.6% 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 500,000 km (not taking into account the actual house connections). 90 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, so that the degree of connection to wastewater treatment plants comes up to almost 100 %. The length of the German public sewage network totals approximately 515,000 km. In addition, there are about 63,000 storm water drainage systems. The volume of sewage sludge amounts to around 2 million tons. Stagnating or slightly decreasing volumes are expected for the future.

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Highlight Box

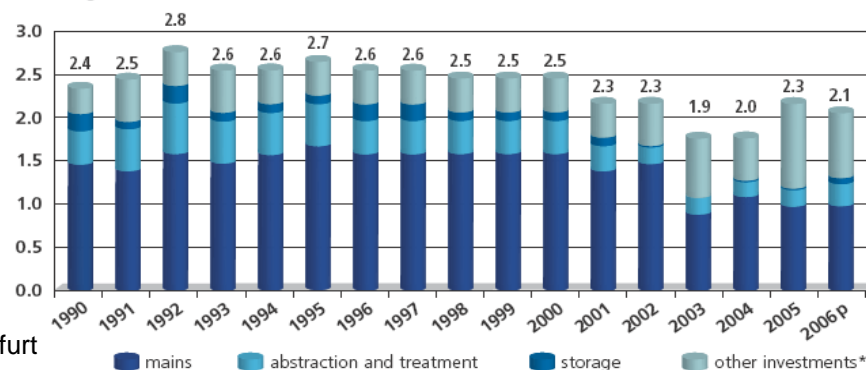
The German water and wastewater industry is well developed and of very high standards.

The quality of tap drinking water is high. However, Germans prefer to drink bottled water. The use of home filtration systems is also growing slowly.

Sales opportunities include energy saving and environmental technologies (e.g., testing and measuring equipment, energy efficiency enhancing or chemical treatment technologies).

Development of investments from 1990 to 2006 in public water supply

according to asset areas in billion Euro



Source: BDEW Water Statistics; p = provisional

* other investments = meters and measuring devices and investments, for which a distinction into asset areas is not available