

Bridging the gap between growth and resilience

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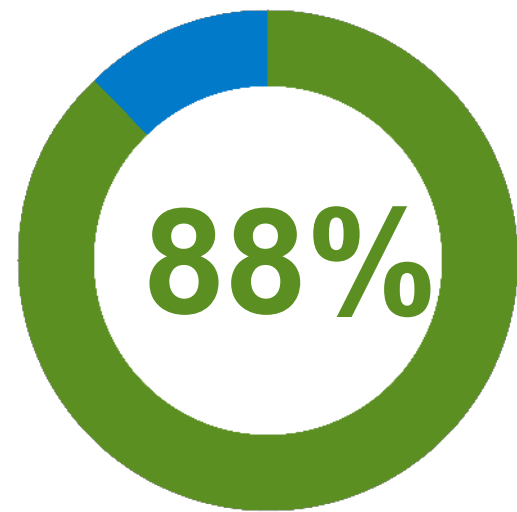


- ▲ The global leader in industrial and institutional **water and hygiene**
- ▲ Serving customers in food, healthcare, energy, hospitality and industrial markets
- ▲ Nearly 3 million points of contact with customers in 170 countries
- ▲ Helped customers save 171 billion gallons of water in 2017

- ▲ A global leader in **water purification technology for industrial and infrastructure markets**
- ▲ Pioneer in water recycling, brine management, and zero discharge
- ▲ Help clients reduce water and energy footprint
- ▲ More than 1,600 water management projects in over 60 countries

Today's challenge

Acknowledged risk



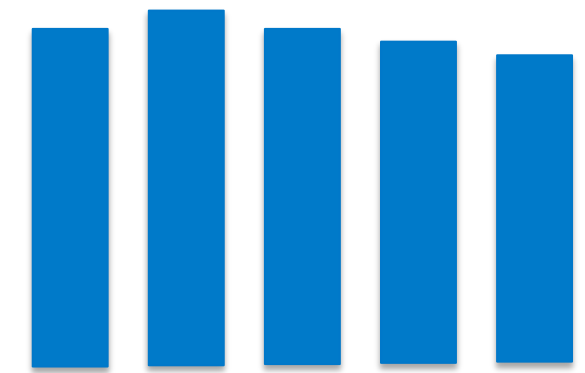
Companies know they need to take action on water management

Lack of planning

44%
have
NO PLAN
for water action



Growing urgency




In high-income countries, industry uses more than

40%
of all water

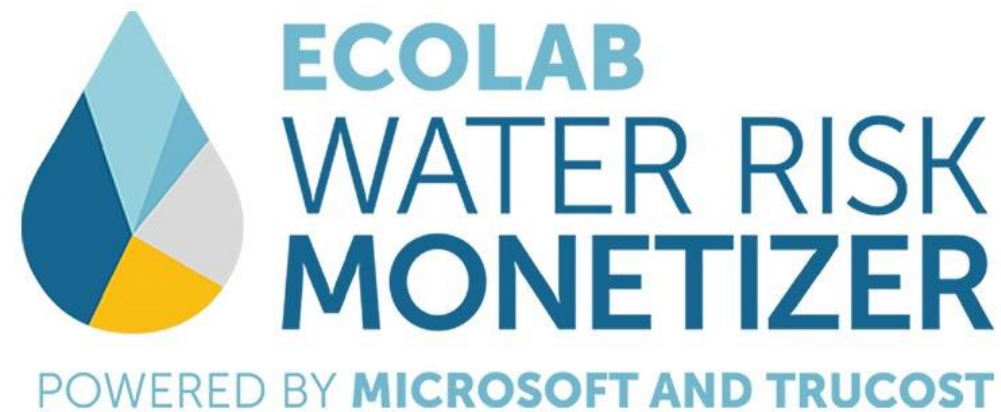
What's the disconnect?



The background of the image shows a dark blue, slightly textured surface with several concentric ripples emanating from a central point, suggesting a drop of water has just been thrown. The ripples are most prominent in the lower half of the frame. A semi-transparent dark grey horizontal band is overlaid across the middle of the image, containing the text.

**Strategy can't accomplish
anything without action**

Tools to build resiliency



Publicly available financial modeling tool that helps businesses incorporate water risks into business decisions and planning

- ▲ Identifies water risk
- ▲ Puts a dollar figure on it
- ▲ Indicates that investment is necessary



A holistic approach to sustainable water management at the corporate level with practical guides to circular water management practices

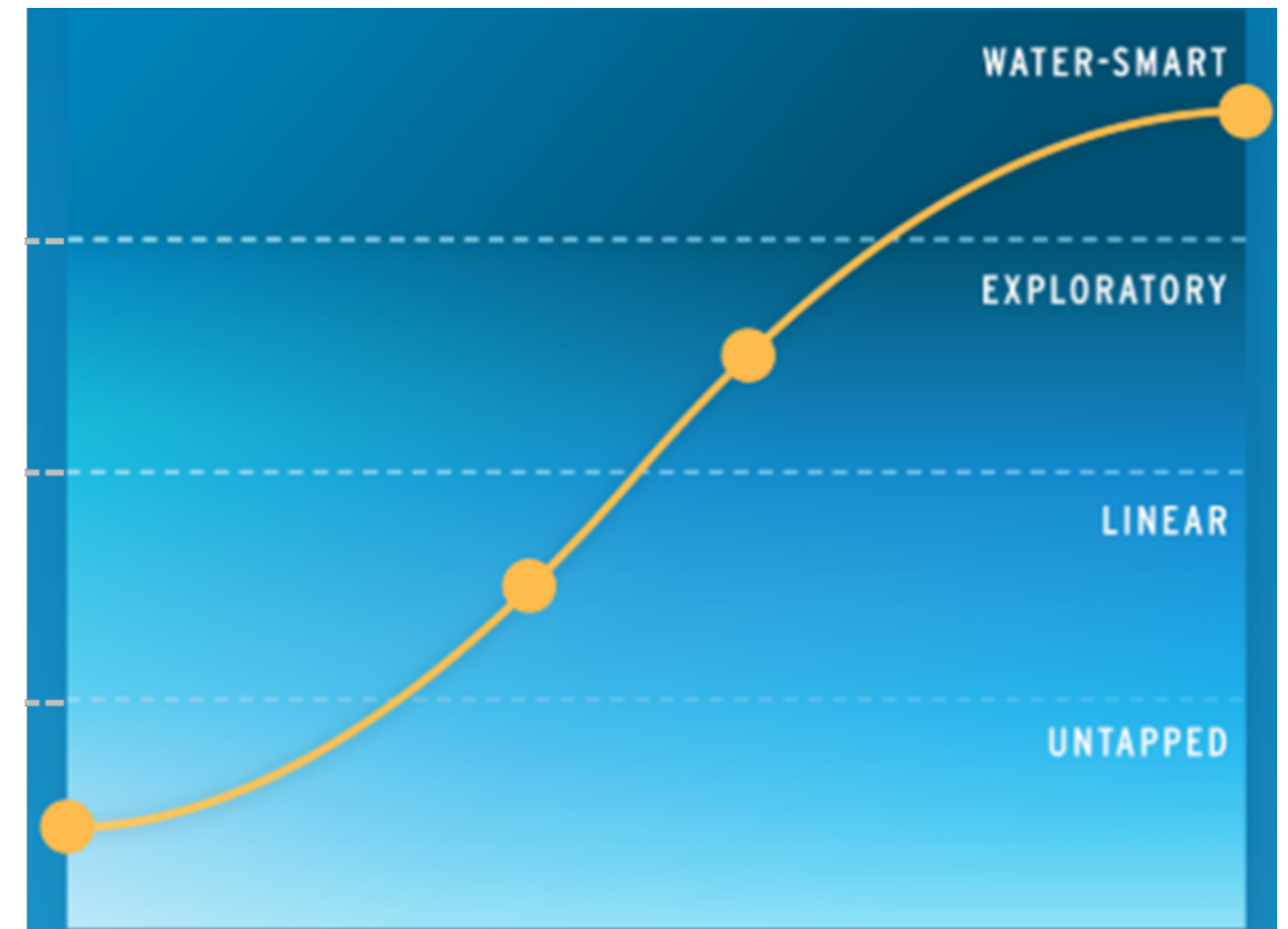
- ▲ Tells you what to do about your water risk
- ▲ Proposes facility-level action steps
- ▲ Helps you prioritize investments

The Ecolab Smart Water Navigator

A free tool to help businesses:

1. **Assess** current water performance
2. **Benchmark** performance and year to year improvement
3. **Improve** water performance by leveraging customized Industry Guides

The Water Maturity Curve



Get started today at: www.SmartWaterNavigator.com

The hidden cost of water

Operational Risk

Downtime Risk

Environmental Risk

Brand Risk



Technology plays a key role in Smart, Sustainable Solutions

Recover Water



Lower Fars Oil Field, Kuwait

Need: Steam for Enhanced Recovery in a water scarce region

Solution: Technology to treat waste from a sewage recycle plant to product ultrapure water

Reduce Disposal Costs



Advanced Vacuum Membrane Distillation

Need: Simple, distributed, cost-effective, brine management for ZLD/facilities

Solution: Low CapEx, high recovery disruptive technology...*Democratizing Zero Discharge*

Achieve Compliance

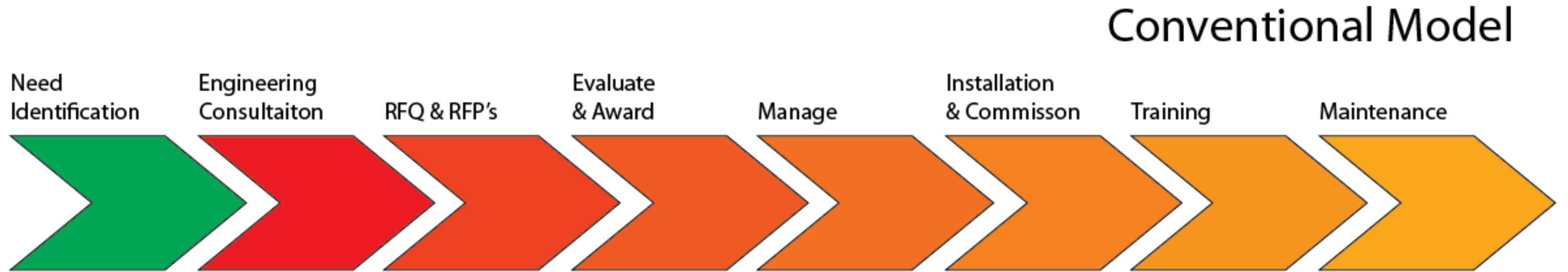


Vegetable Oil Producer, India

Need: Recycle, Zero Discharge to meet water scarcity / environmental regulations

Solution: Complete system and O&M recycling 99% water

...But technology alone is not sufficient





**Smart water management:
local action for global impact**