

## MAKING THE DESERT BLOOM

### GLOBAL WATER CHALLENGES



#### Dependence

A primary resource for **1.4 billion** jobs, and a secondary resource for **1.2 billion** more, water is vital for nearly **80%** of the global workforce.

Source: UNESCO 2016

**70%** of the world's water withdrawals is channeled to agriculture.

Source: The World Bank 2017



#### Scarcity

By 2025, **half of the global population** will be coping with water scarcity.

Source: WHO 2017

If global water management continues as is, then **by 2030 demand** for freshwater will exceed supply by **40%**.

Source: 2030 Water Resources Group 2016



#### Quality

In 2015, **29% of the global population** lacked a regular source of uncontaminated drinking water, and **61%** lacked safe-management services for their waste.

Source: WHO and UNICEF 2017

**Two billion** people worldwide draw their drinking-water from sources contaminated with feces.

Source: WHO 2017

### GLOBAL WATERTECH TRENDS



#### Global water market value exceeds \$600B

Source: based partly on Frost & Sullivan 2016



#### Emerging industry behavior:

Collaboration between key stakeholders, bundling of technologies and service offerings, consumer education in the developing world, and increased customer engagement.



#### Hot Technologies:

IoT-enabled and data-driven solutions for smarter water management in everything from irrigation to water utilities.

Biofiltration-based water and wastewater treatment.

### STRENGTHS OF ISRAELI WATERTECH



#### Technological prowess

Israeli Watertech is augmented by the ecosystem's famous expertise in biotech, security, sensors, data analytics, and IoT.



#### Innovation out of necessity

Mostly an arid, desert country, Israel has had to excel in innovation to manage its scarce water resources.



#### Outward-looking entrepreneurs

With a small domestic market, Israeli entrepreneurs direct their innovation for the international arena.



#### Water Practices

Israel overcomes its water challenges through a combination of technological innovation, government initiatives, policies, and public-private partnerships.

## ISRAELI WATER MANAGEMENT



Israel is the global leader in water reclamation, treating approx. **80% of its wastewater for reuse in agriculture.**

Source: Bank Leumi le-Israel 2016



**Most of Israel's freshwater comes from its five desalination facilities,**

including the Sorek plant – the largest seawater reverse osmosis plant in the world.



**Israel is a world leader of crop-yield to water ratio.**

Source: based on OECD Observer 2015

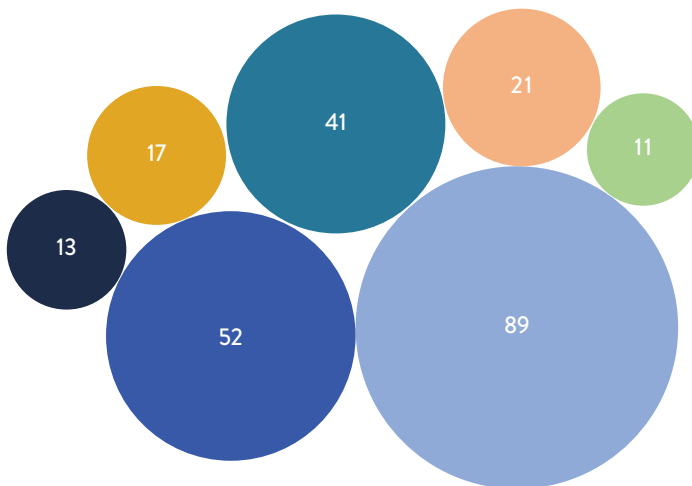


**Israeli exports of its water technology total \$2B annually.**

Source: Bank Leumi le-Israel 2016

## ISRAELI WATERTECH COMPANIES BY SUBSECTOR

180+ innovative water companies\*



- Water & Wastewater Treatment
- Irrigation
- Water Systems
- Water Network Management
- Desalination
- Domestic Use
- Water Quality Detection

\*Some companies innovate in multiple subsectors

## SUCCESS STORIES



**Fluence** offers a modular wastewater treatment solution, building quiet, odorless treatment facilities for local distribution.

Established through a merger between Emefcy and RWL Water in 2017



**Indegy** secures critical infrastructure such as water utilities, providing situational awareness and real-time security for industrial control networks.

Raised \$12M in an A round in 2016.



**Netafim** invented drip irrigation in the 1960s and holds 30% of the global drip irrigation market.

Mexichem acquired an 80% stake in Netafim for \$1.5B in 2017.



**Desalitech** leads its industry for its high-efficiency reverse osmosis (RO) systems.

Raised over \$24M since its establishment in 2008. Listed among MIT Technology Review's "10 Breakthrough Technologies in 2015."



**TaKaDu** offers an automated, cloud-based platform that enables utilities to detect, analyze, and manage network events such as leaks and faulty assets.

Raised over \$15M since establishment in 2009. Deployed globally, including by five separate utilities in Australia.

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**START-UP NATION CENTRAL IS YOUR BRIDGE TO ISRAELI INNOVATION.**

Contact Start-Up Nation Central to help you access the Israeli Watertech sector, and to connect with relevant start-ups and industry figures.

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