

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

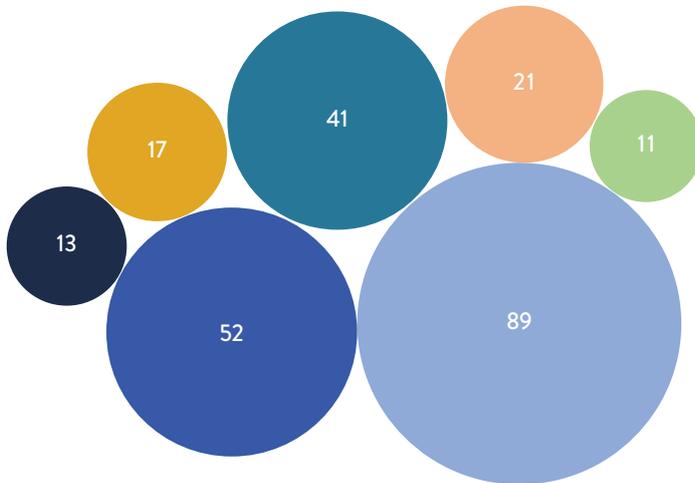


Israeli exports of its water technology total \$2B annually.

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.

**START-UP
NATION
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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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