



Summary

- **The world faces a significant water resource challenge**
- **Business-as-usual practices will not close the “water gap”**
- **A cost-effective, sustainable solution is possible, but requires economy-wide actions**
- **A pathway towards water sector transformation exists**

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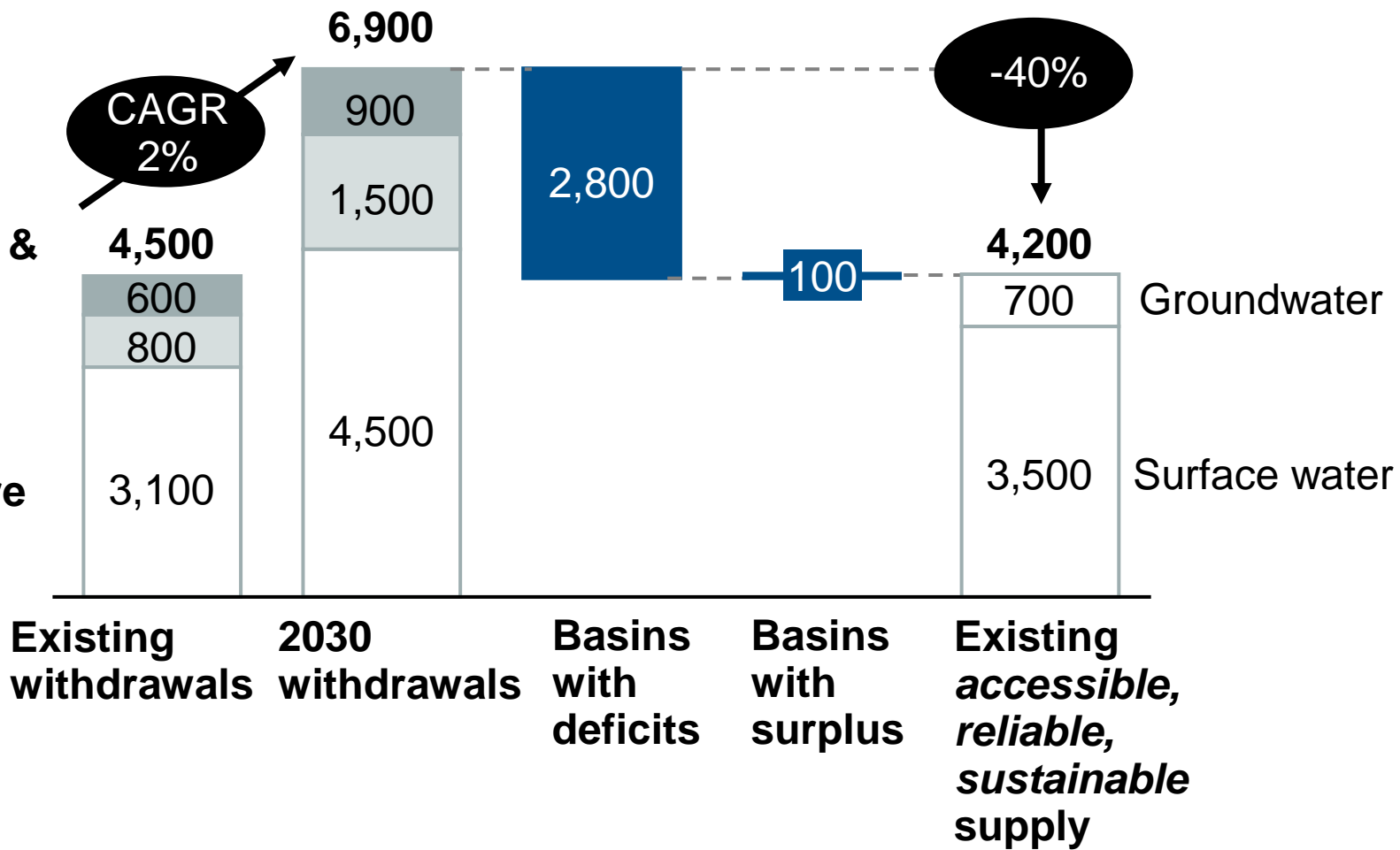


CHALLENGE

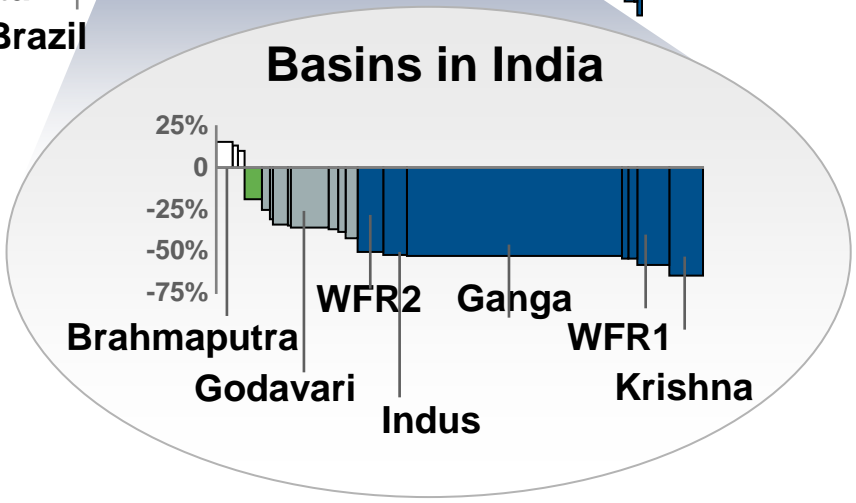
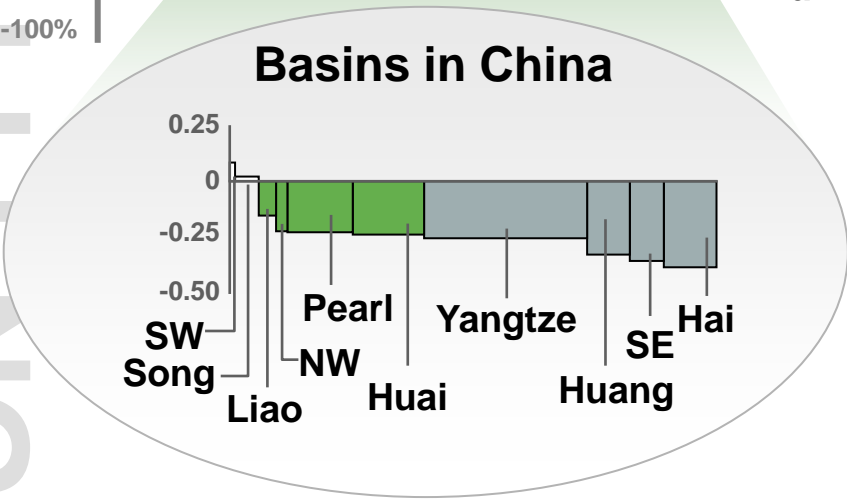
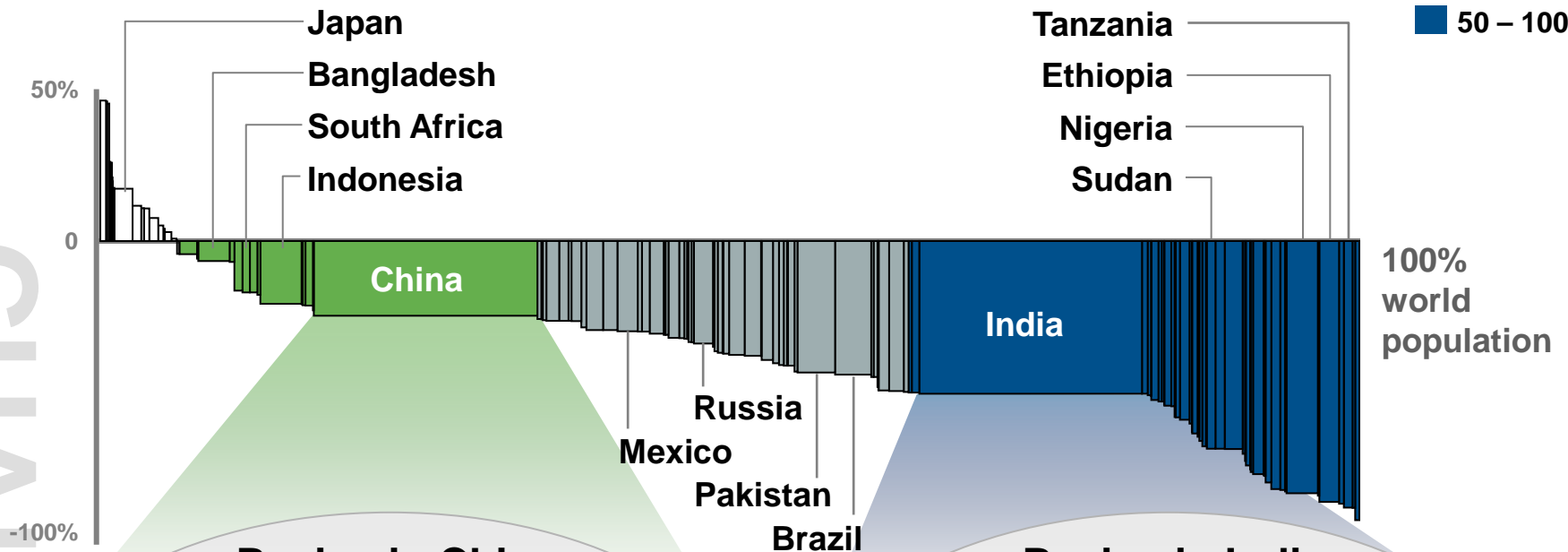
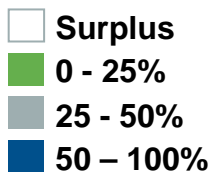
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Future demand for water will outstrip our capacity to provide it | Billion m³

CHALLENGE



Projected gaps strongly differ by country and basin in 2030



CHALLENGE

China's water gap is driven by competing demands

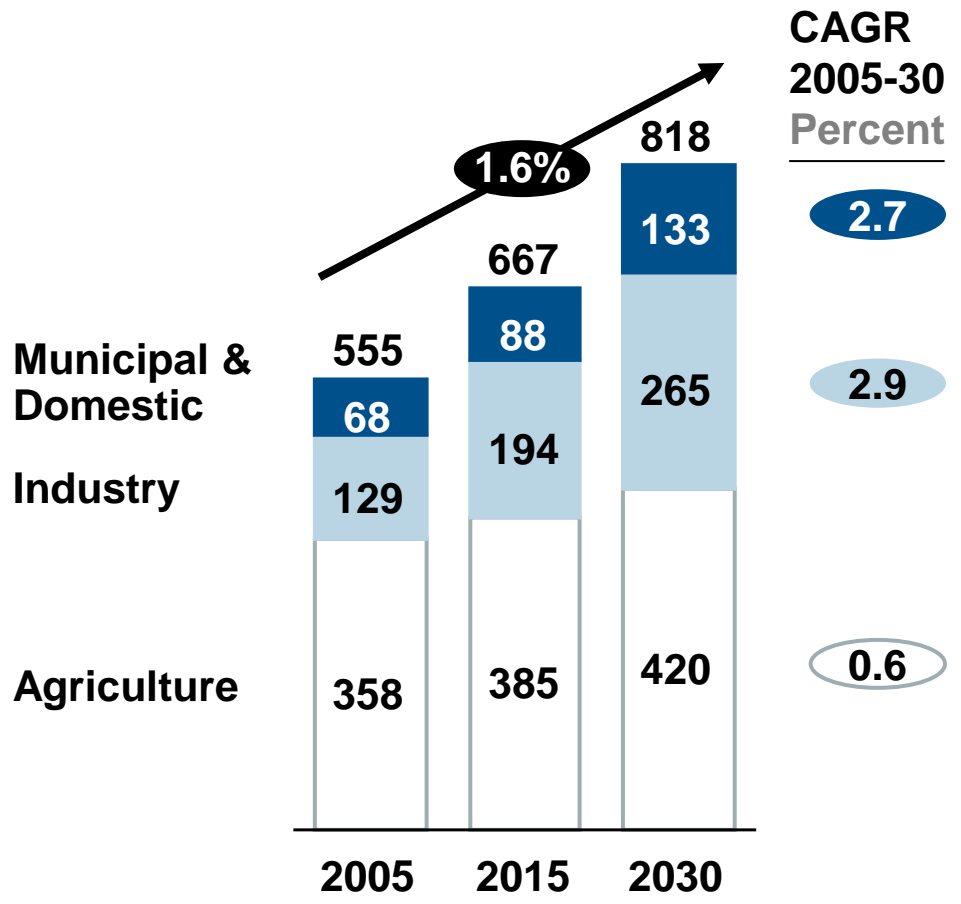
Water gap in 2030

CHALLENGE



Water demand by sector

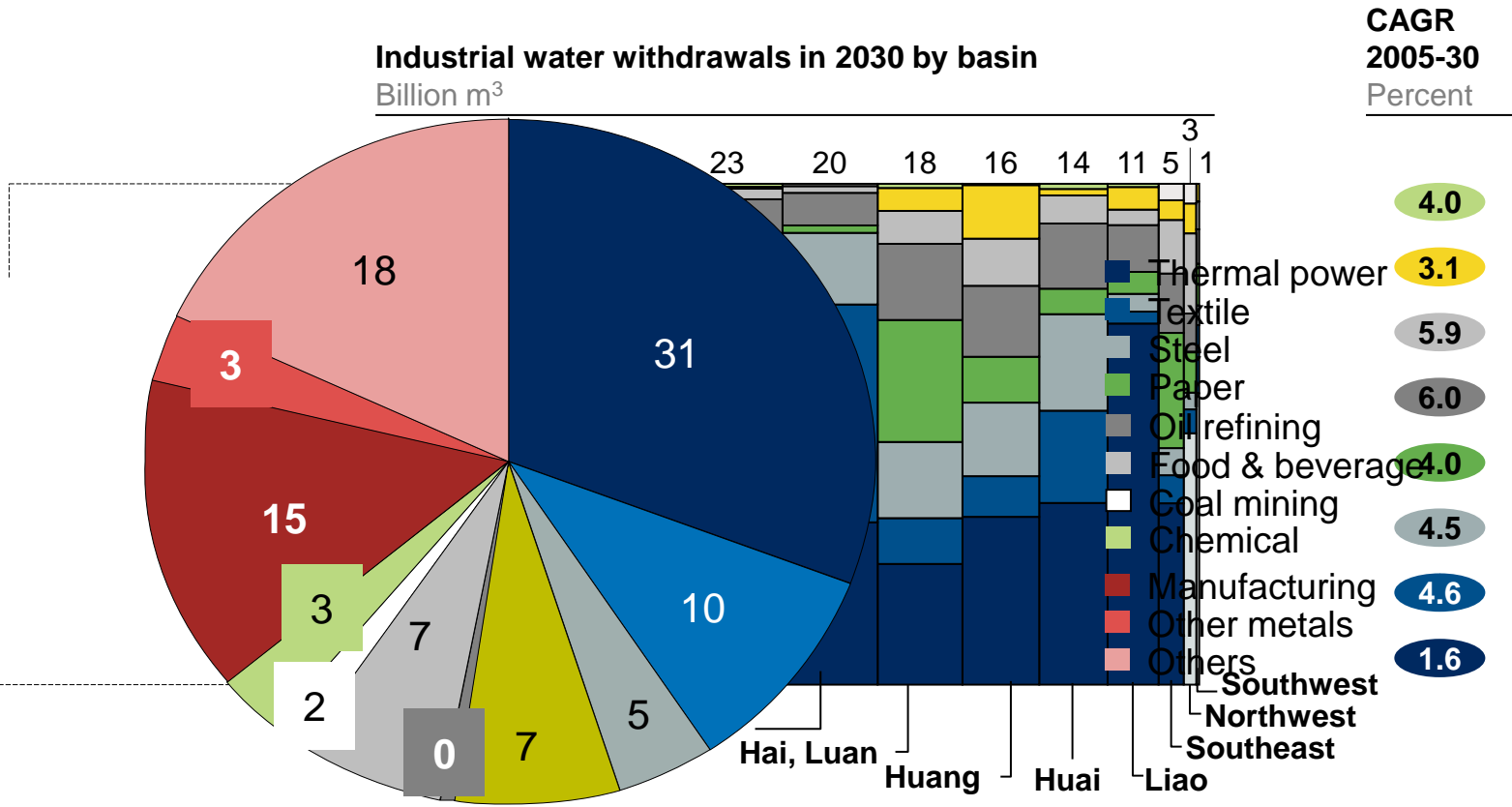
Withdrawals, billion m³



Industrial water in China

Water withdrawals in 2030 by segment, Percent

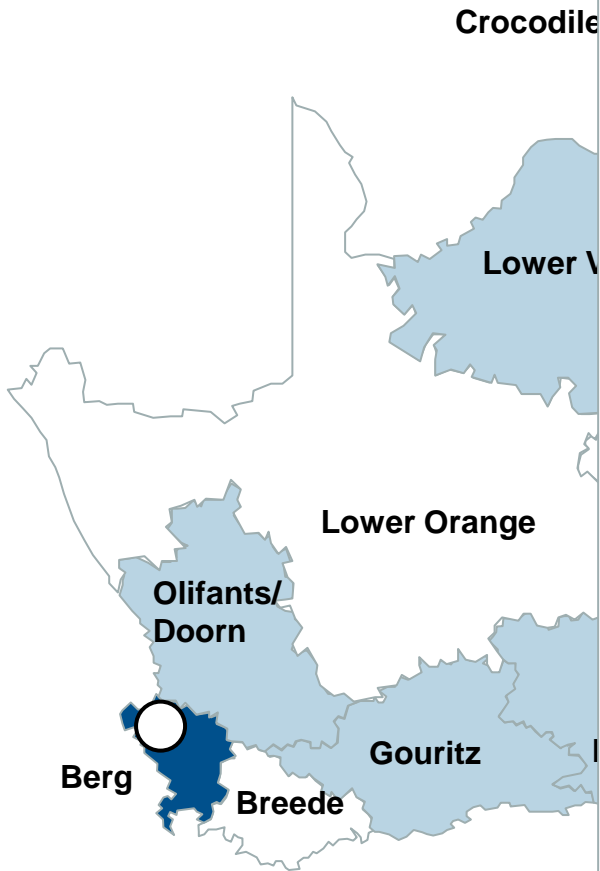
CHALLENGE



South Africa's industrial vulnerability

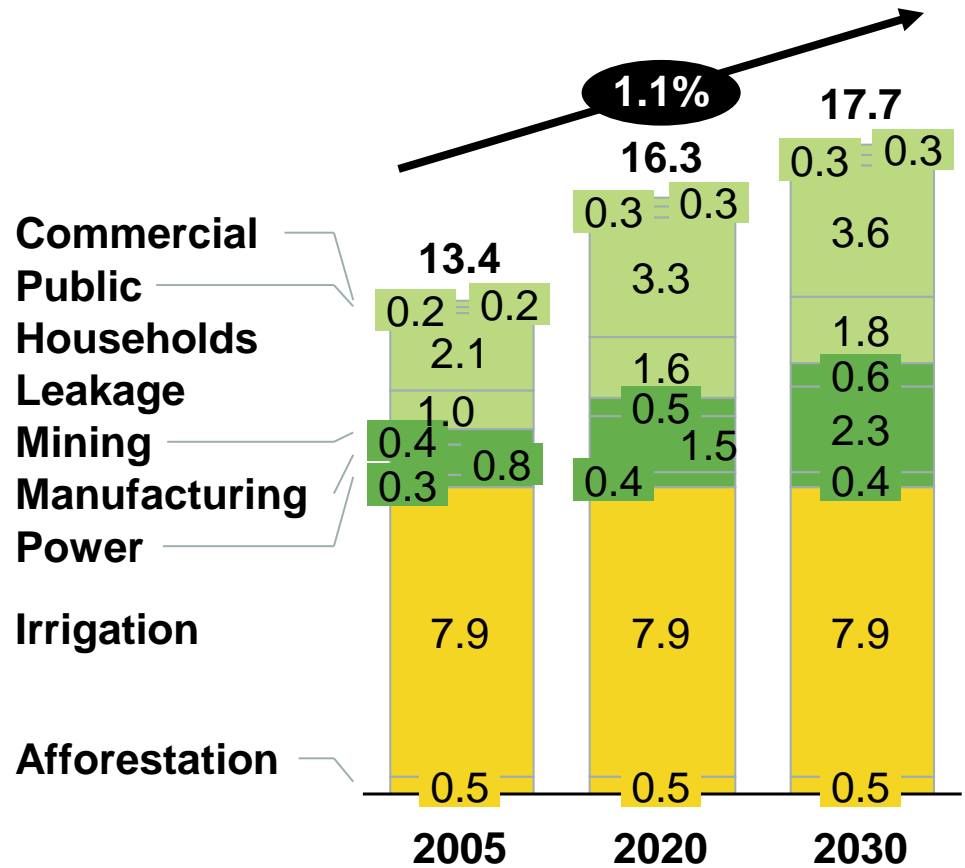
Size of gap

- Surplus over projected needs
- Moderate (0% to 20%)
- Severe (20% to 50%)



Water demand by sector

Billion m³



CHALLENGE

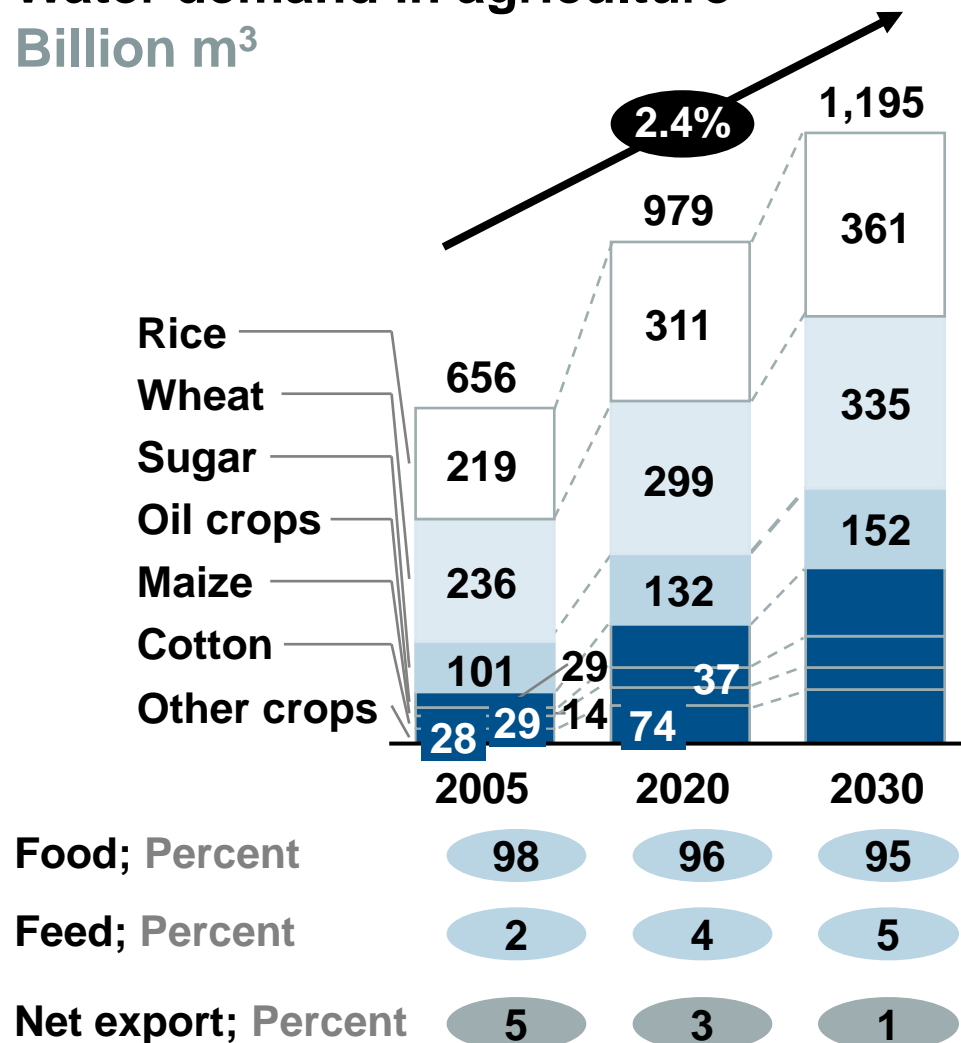
India's aggregated water gap is driven by agricultural demand

Water gap in 2030

CHALLENGE



Water demand in agriculture
Billion m³





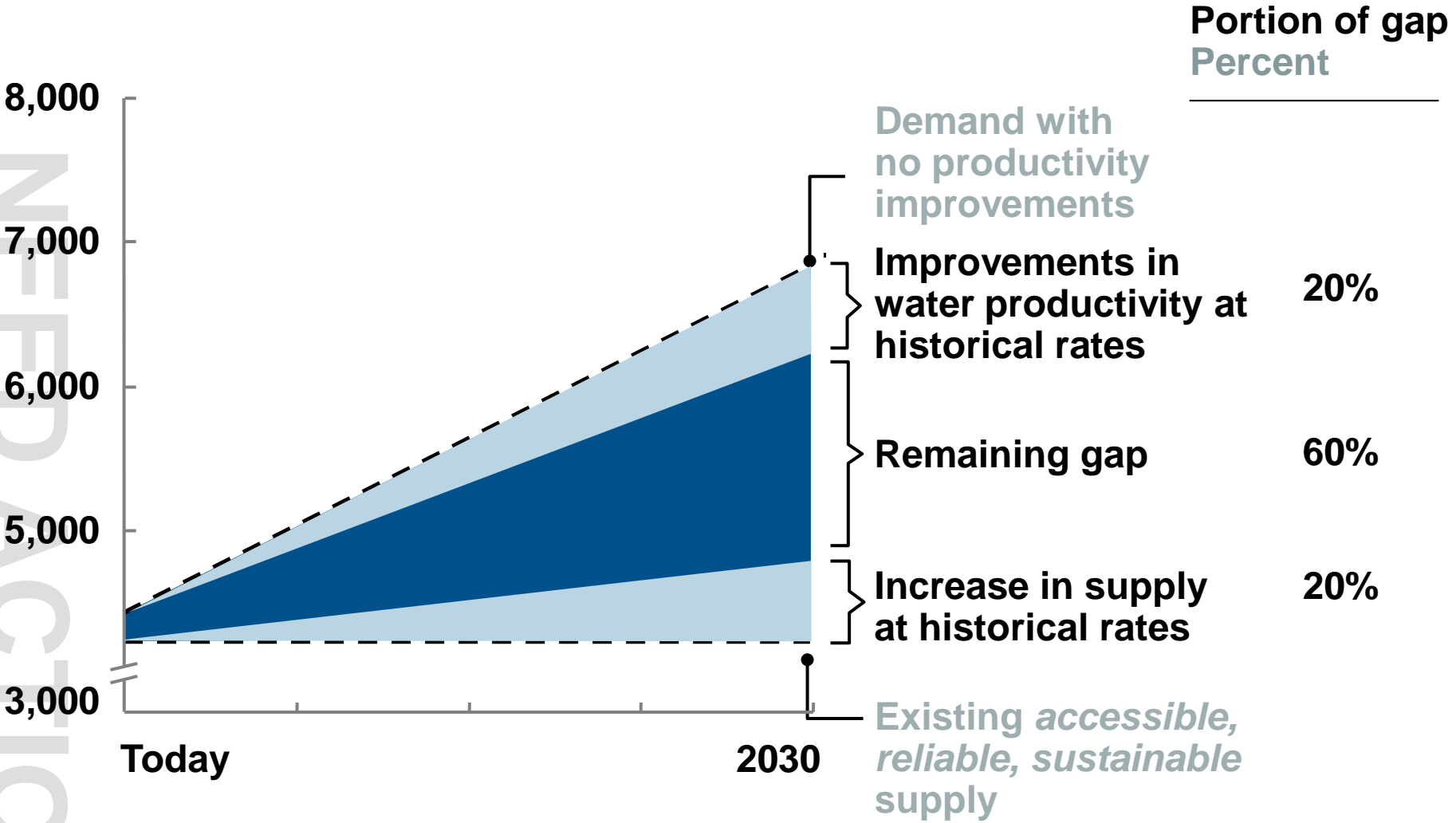
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NEED FOR ACTION

- The world faces a significant water resource challenge
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Business-as-usual approaches will not meet demand for bulk water

Billion m³



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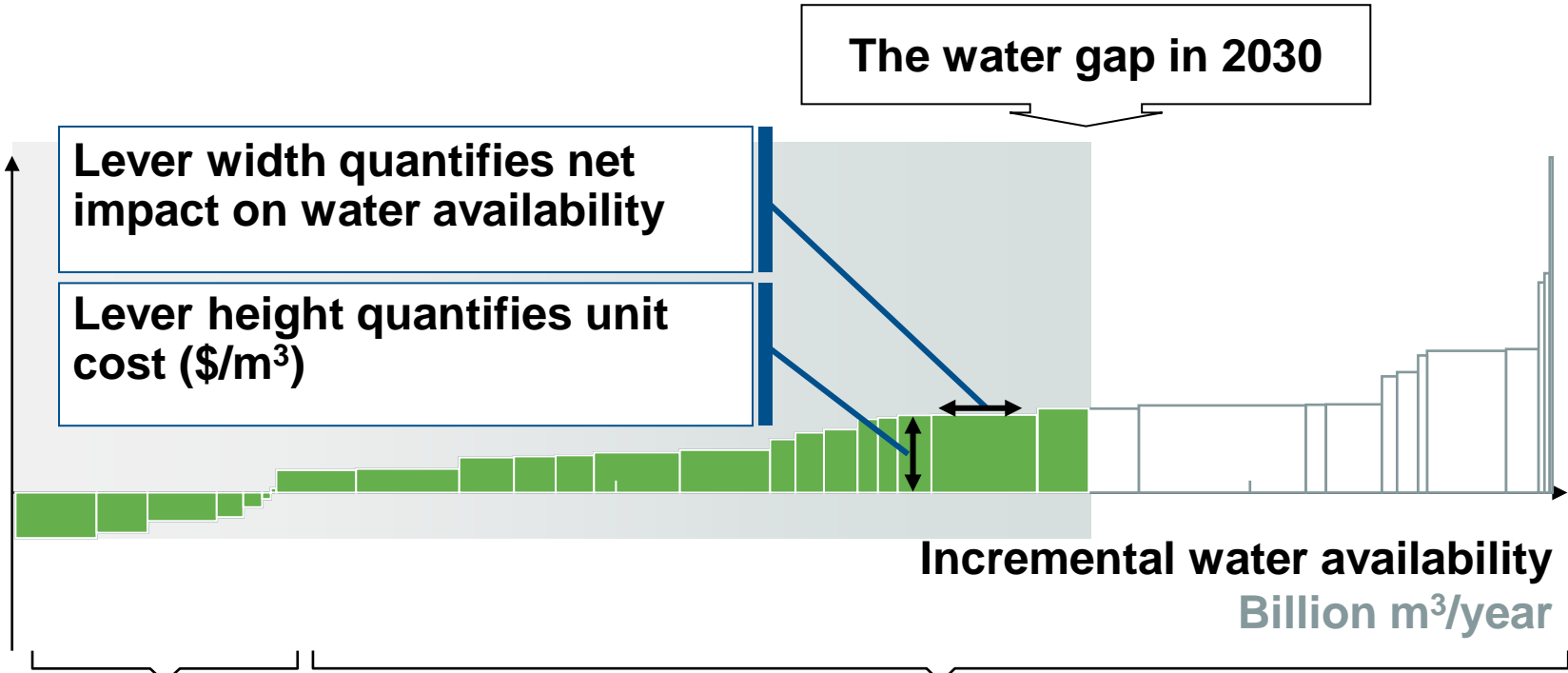
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SOLUTIONS

The water availability cost curve is a powerful organizing framework

Net marginal cost in 2030
\$/m³



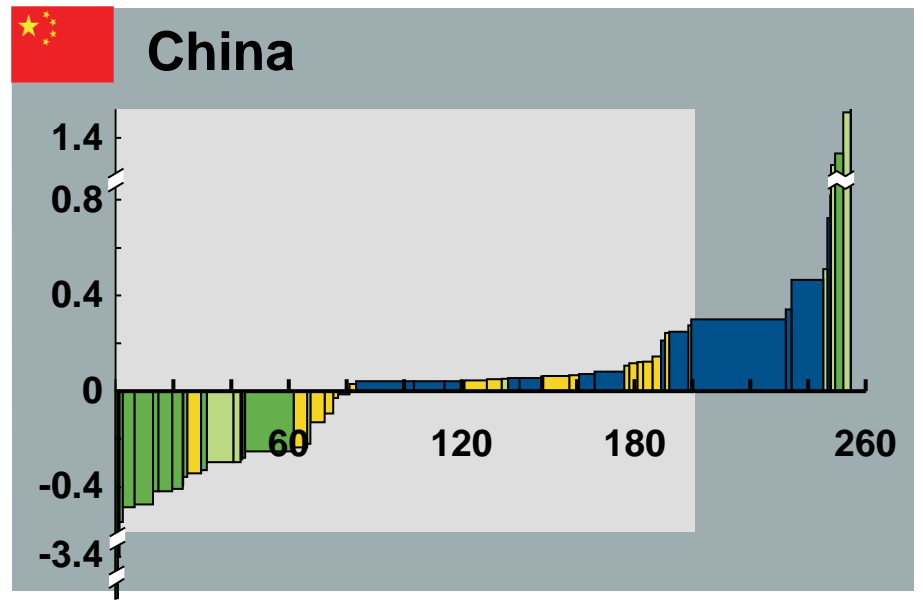
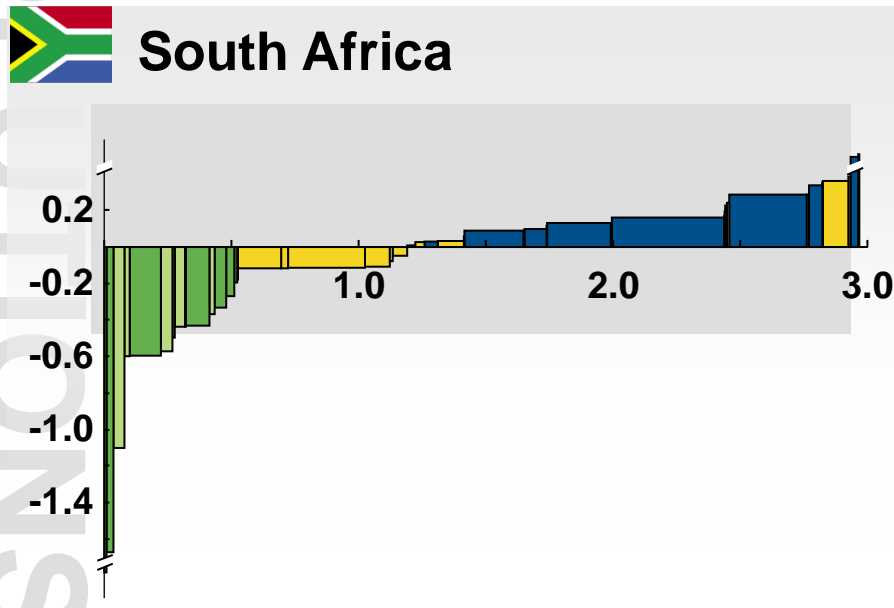
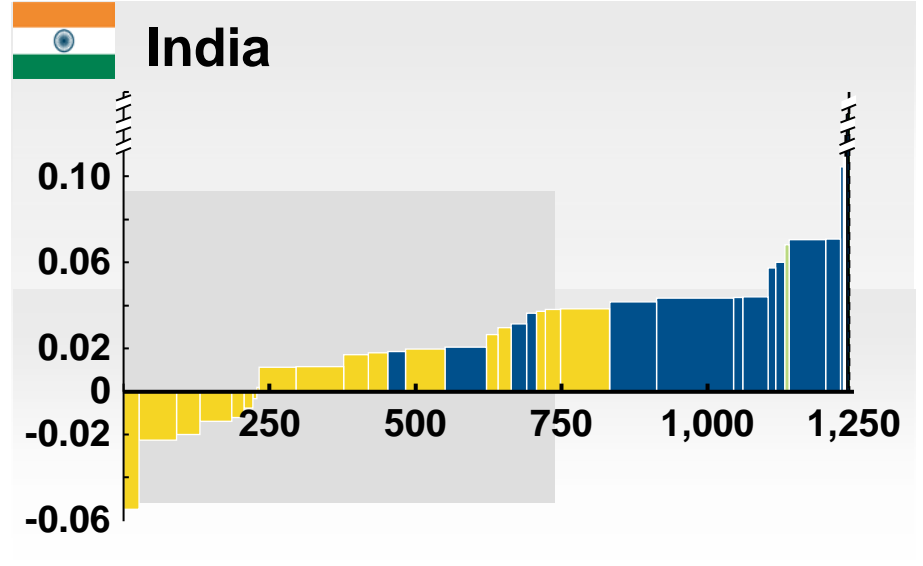
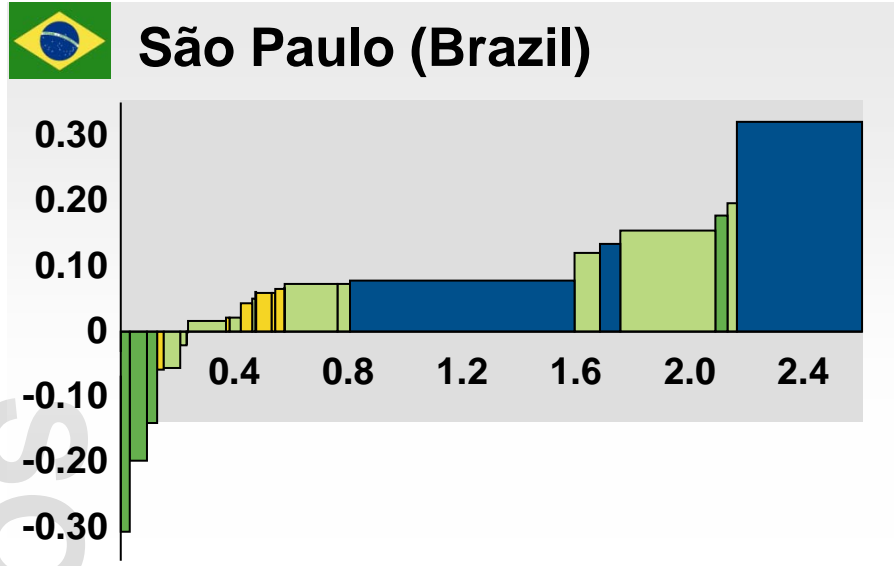
Measures with *net financial savings* over the lifetime of the measure

Measures with *net financial costs* over the lifetime of the measure

SOLUTIONS

The solutions will differ by country

■ Agricultural
 ■ Supply
 ■ Industry
 ■ Municipal & Domestic

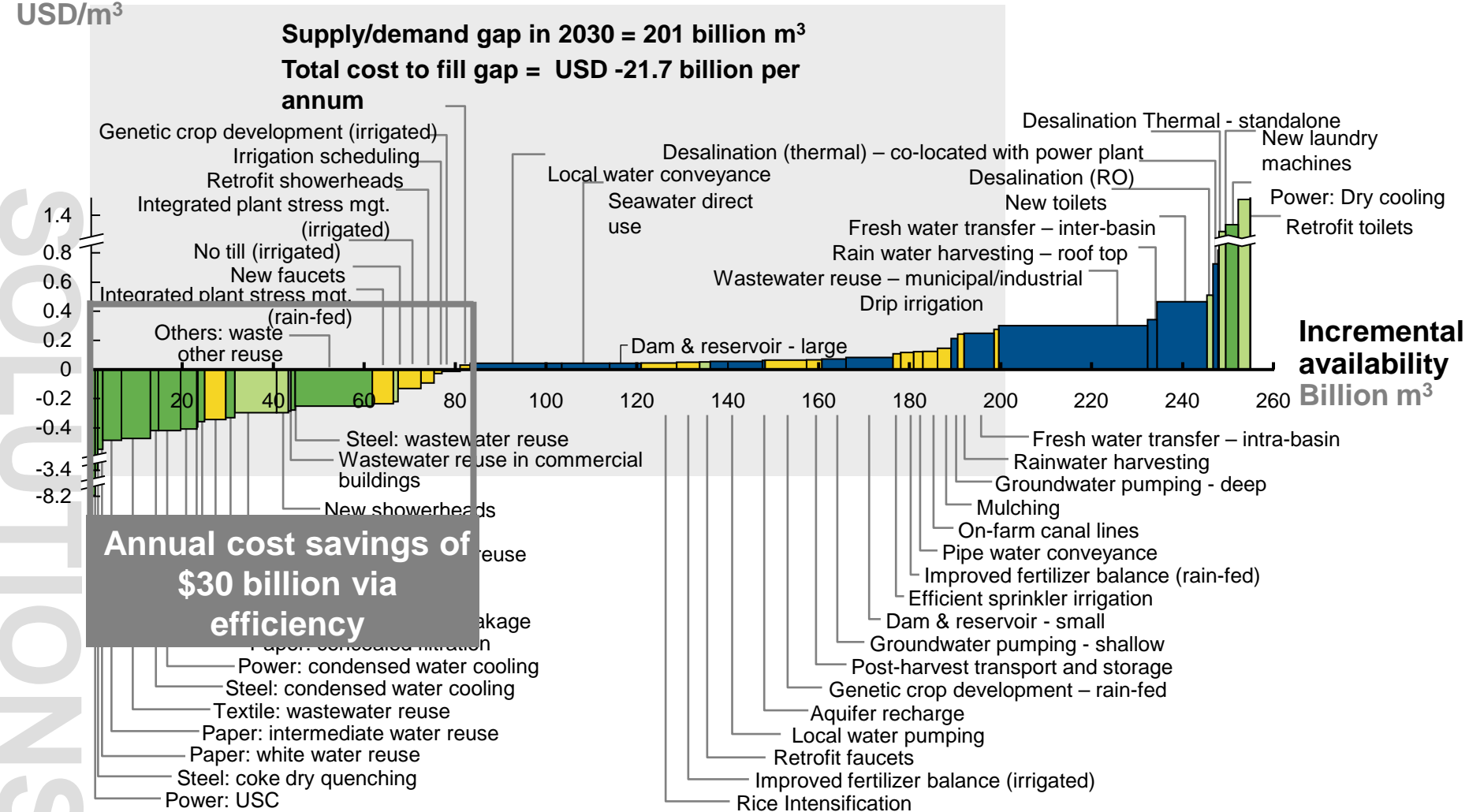


In China, many industrial measures show net cost savings

Cost of additional water availability in 2030, per annum
USD/m³

■ Agricultural ■ Supply
■ Industry ■ Municipal & Domestic

Supply/demand gap in 2030 = 201 billion m³
Total cost to fill gap = USD -21.7 billion per annum



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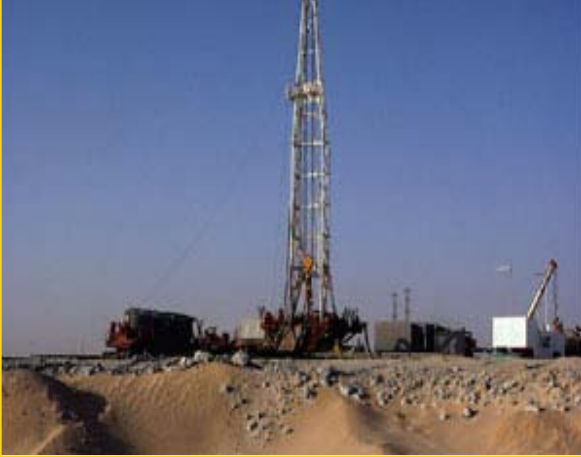
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STRATEGY

Building blocks of a solution

1 Energy-water efficiency revolution



2 Broadening infrastructure models



3 Productivity increases in agriculture



4 Trade with virtual water



5 Water reuse/efficiency in municipalities and industry



6 Water rights and pricing (for large customers)





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