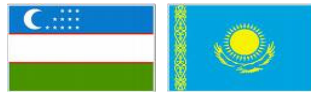
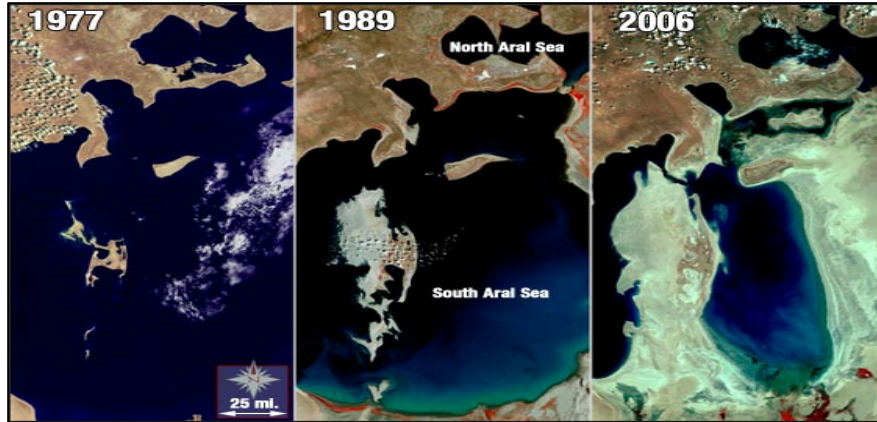
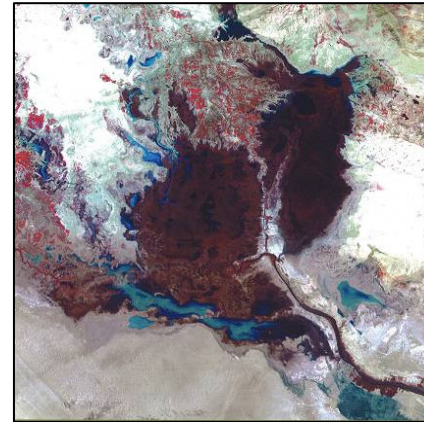


There is broad consensus that water resources are being depleted at unsustainable rates



Large freshwater lakes, such as the Aral sea, are drying up



Marshlands (e.g. Mesopotamian Marshlands) are drained as dams divert ever more water



The Yellow river, supporting the fastest growing cities in the world, at times does not reach the sea



The Colorado often does not reach the sea due to agricultural abstractions and diversions



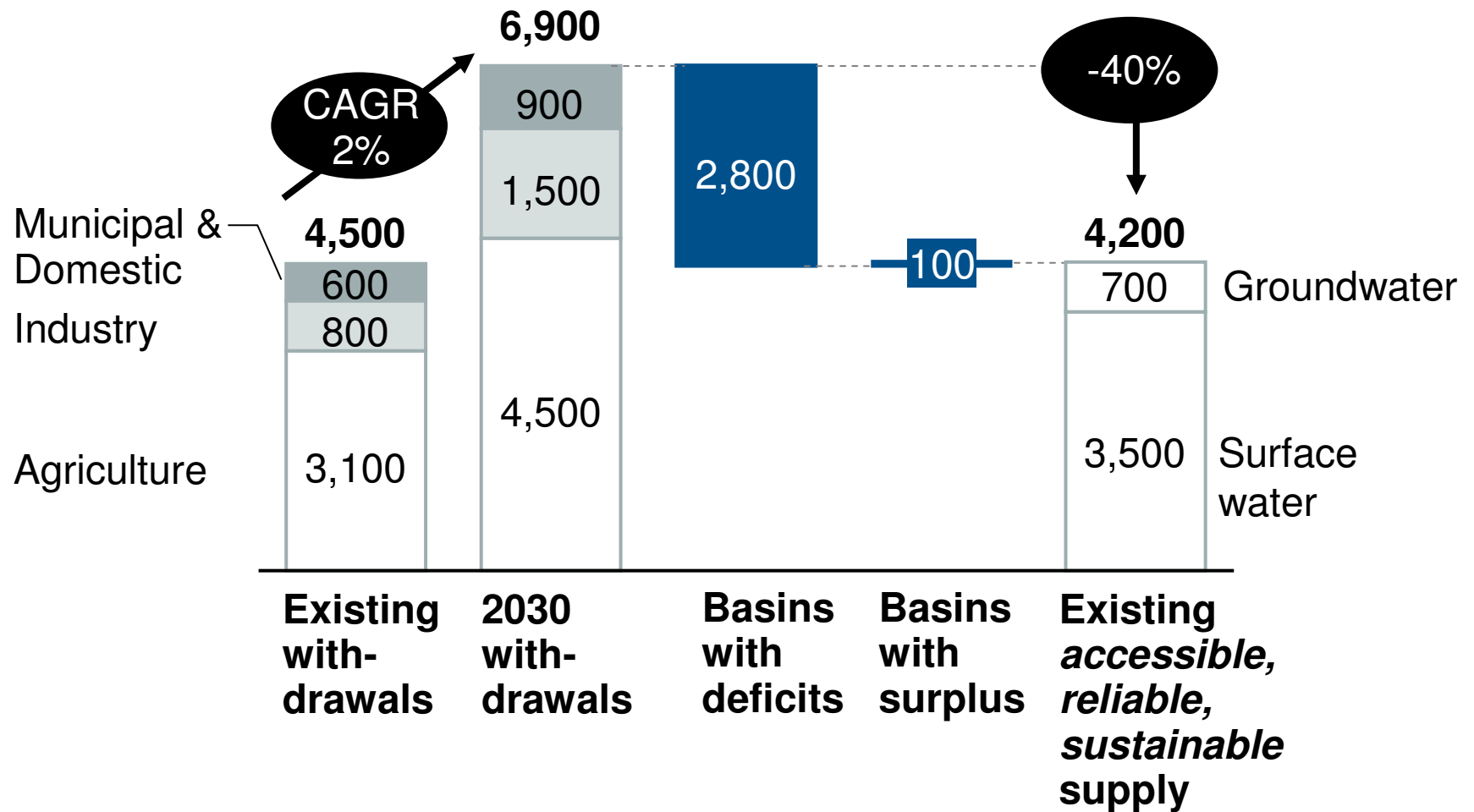
KEY FINDINGS

- **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**

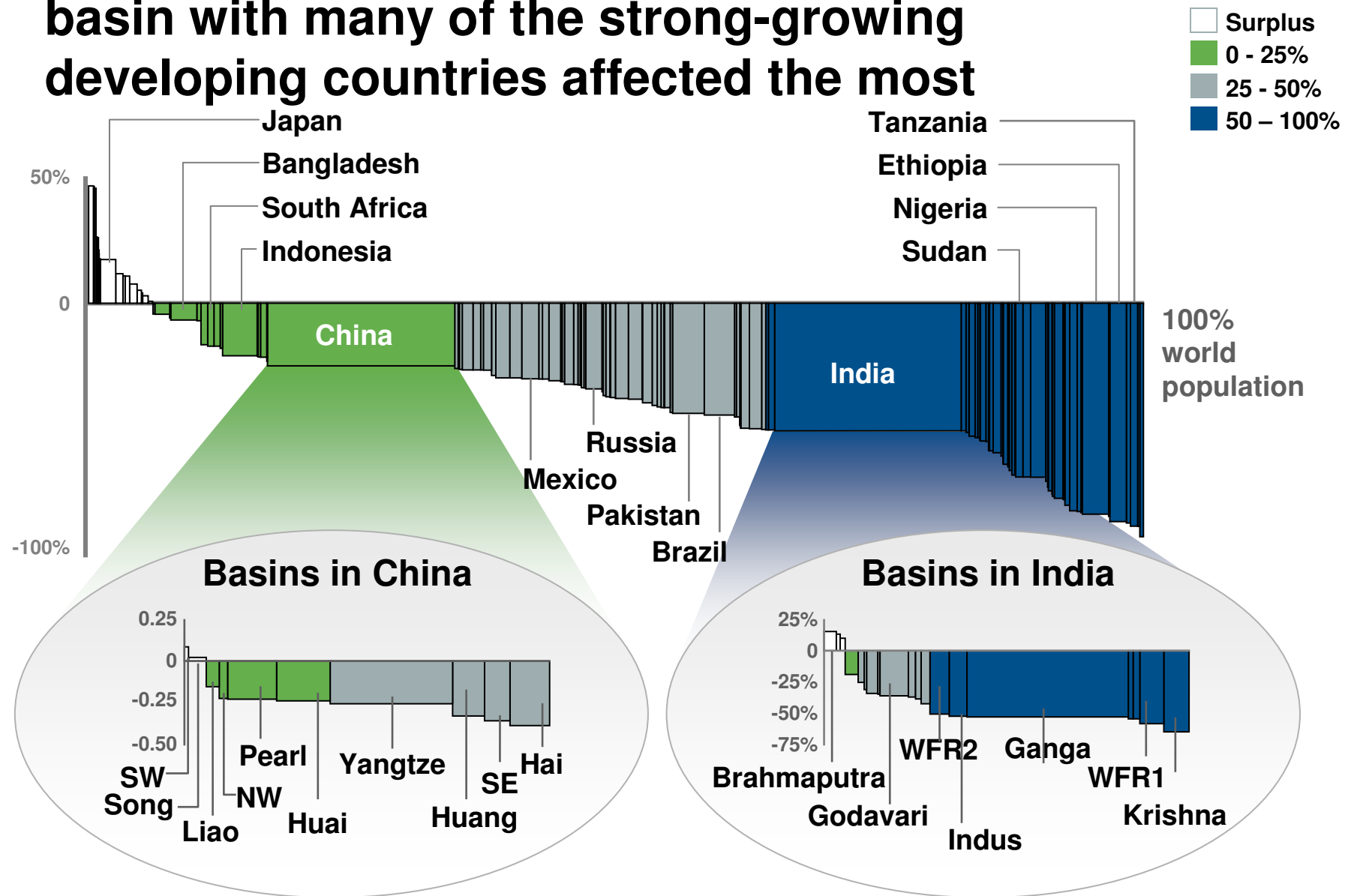
Future demand for water will outstrip our capacity to provide it

Billion m³

CHALLENGE

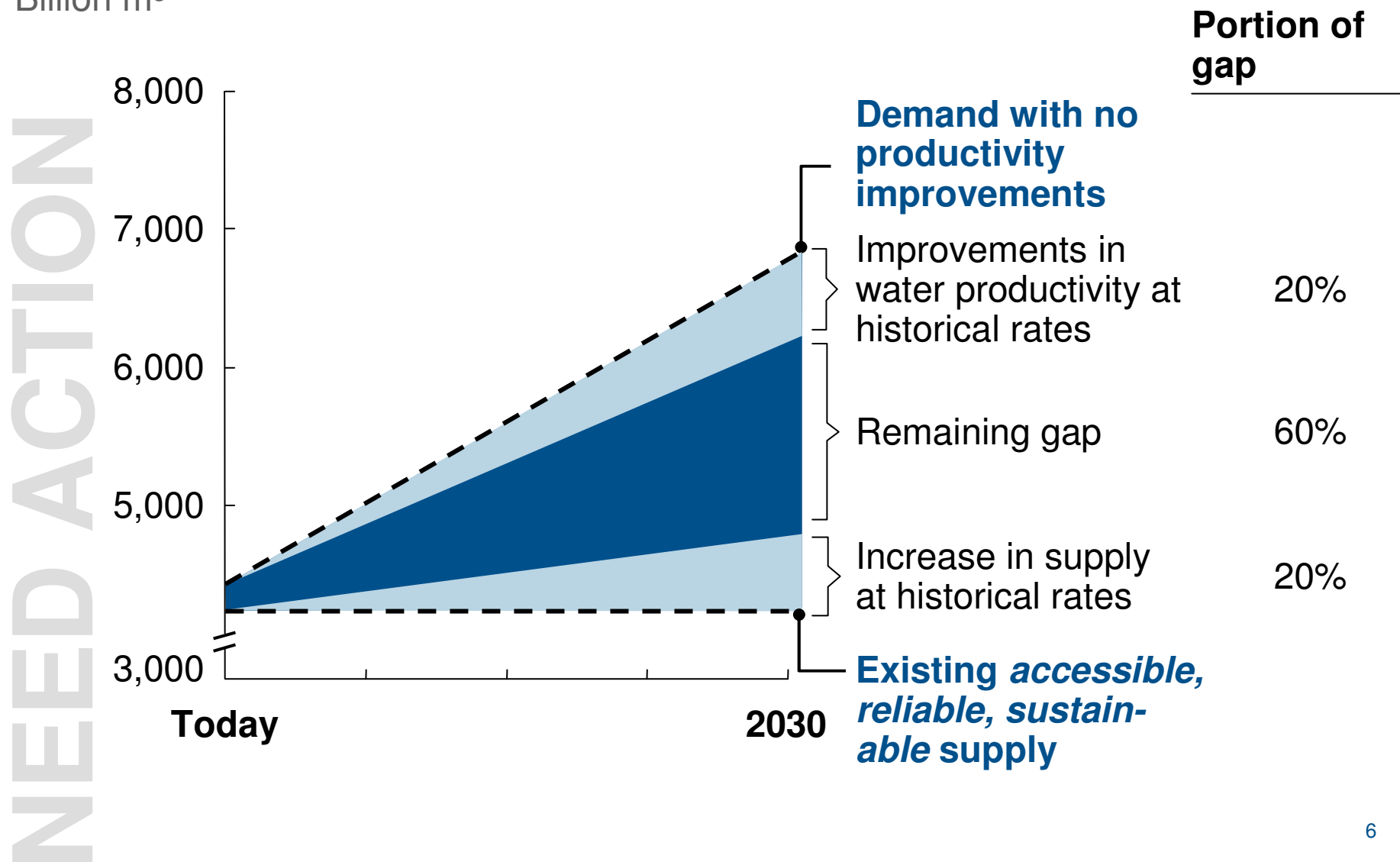


Projected gaps strongly differ by country and basin with many of the strong-growing developing countries affected the most

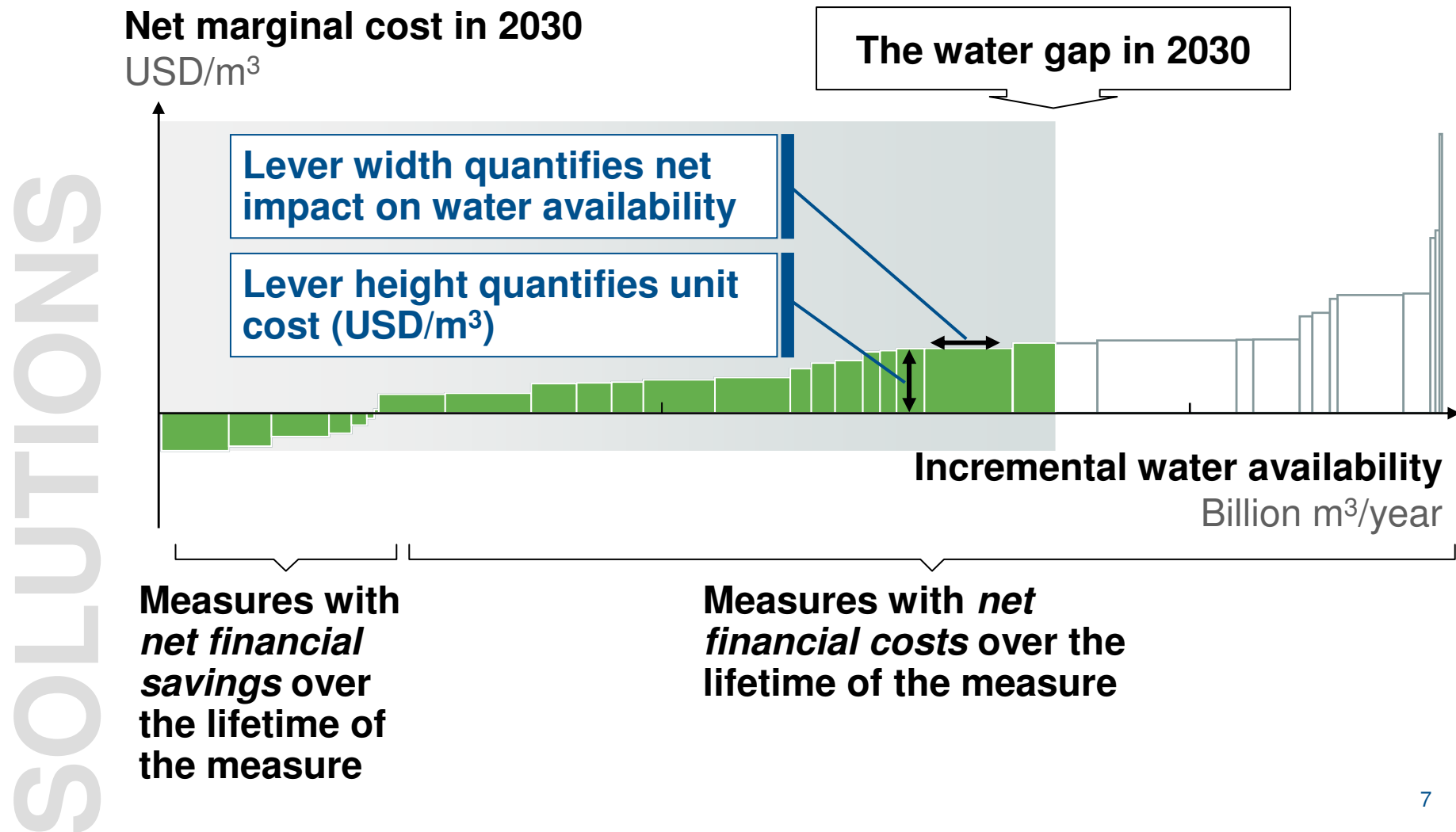


Business-as-usual approaches will not meet demand for raw water

Billion m³



The water availability cost curve is a powerful organizing framework

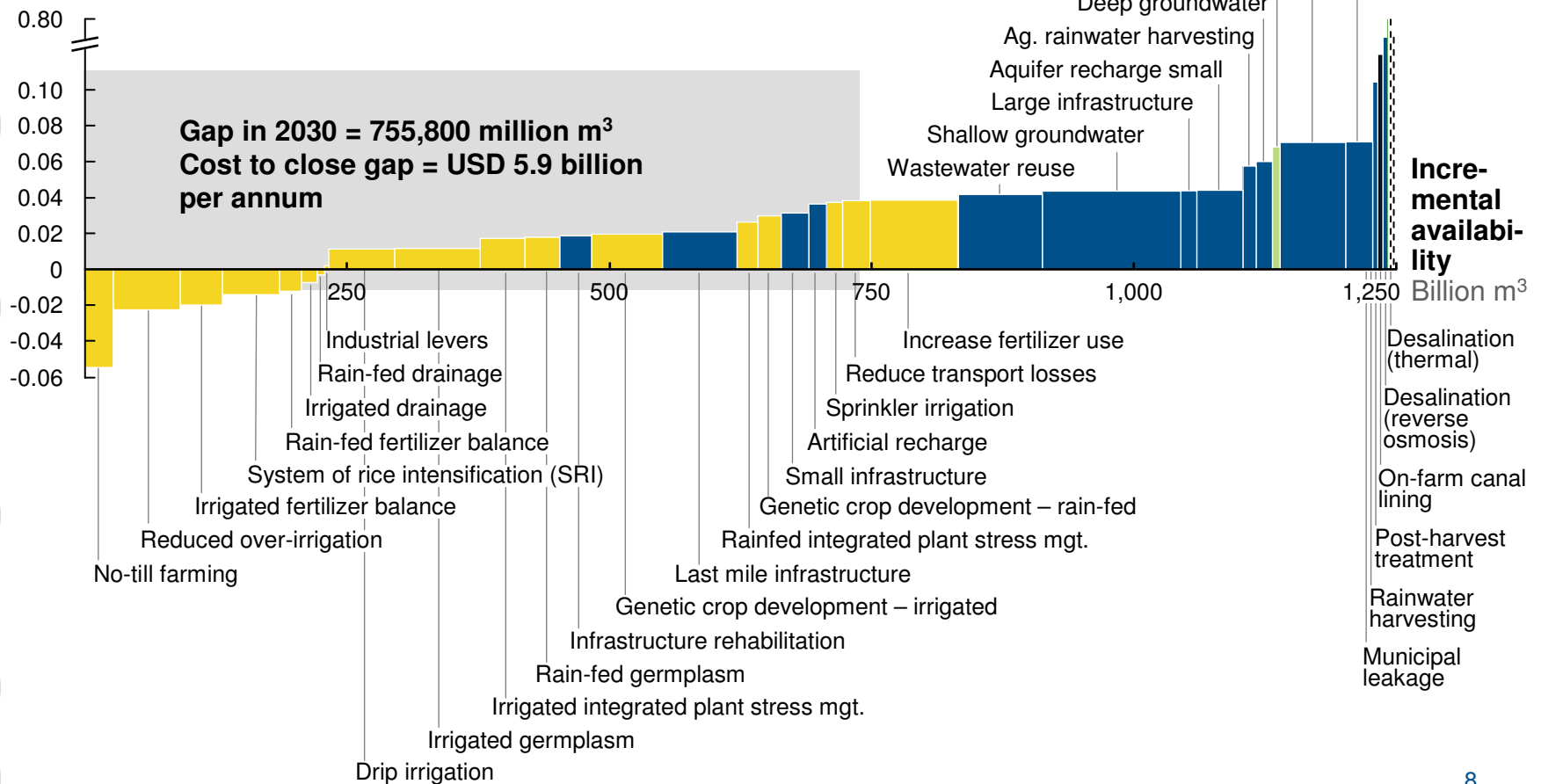


India's water cost curve is dominated by agricultural productivity improvements

■ Agricultural ■ Supply
■ Industry ■ Municipal & Domestic

Cost of additional water availability in 2030, per annum

USD/m³

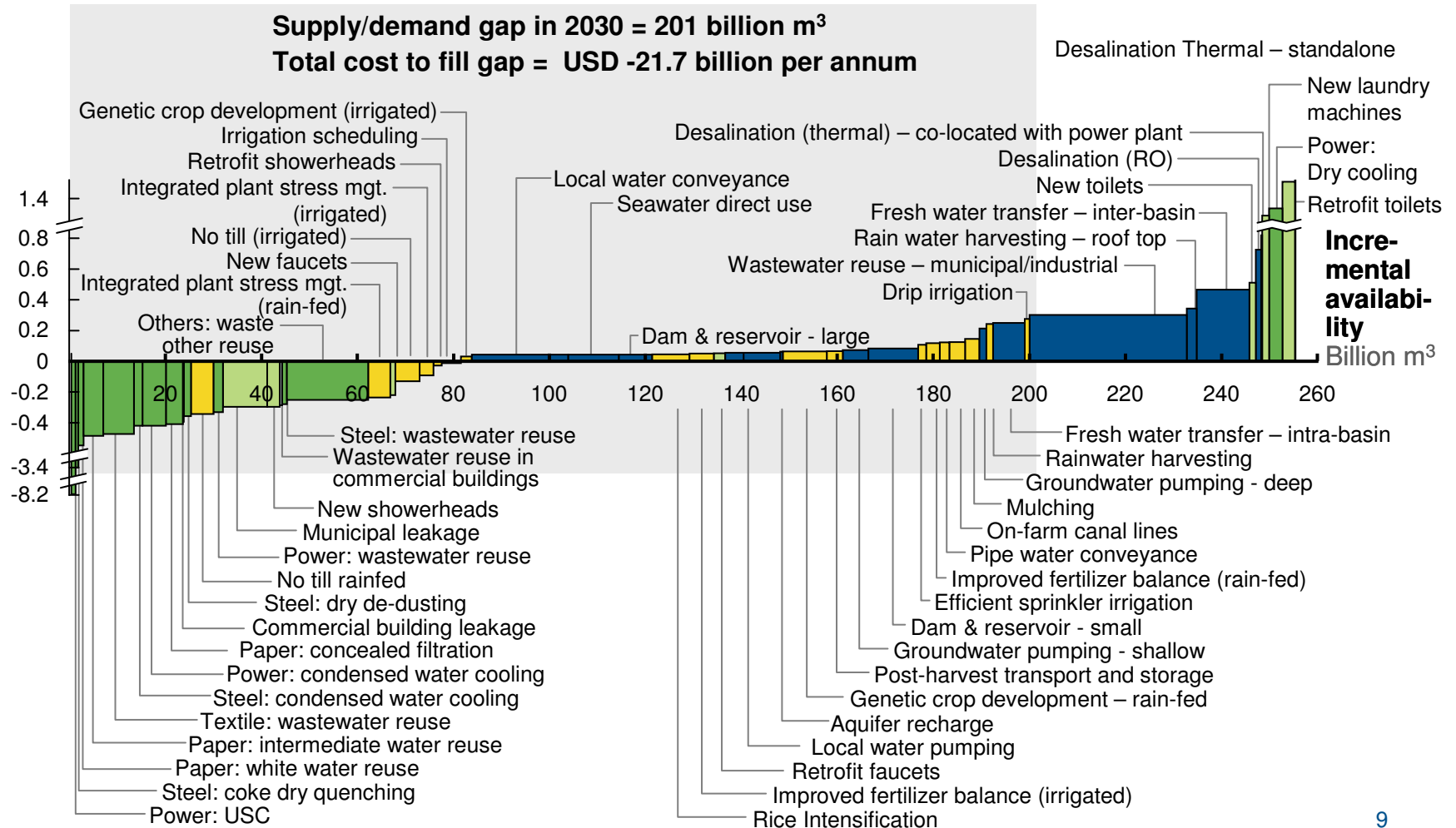


SOLUTIONS

In China, many industrial measures show net cost savings

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

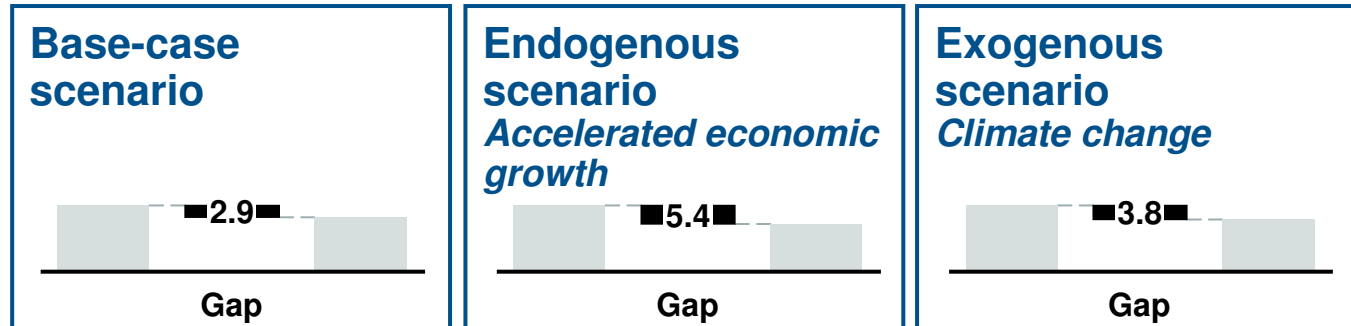
■ Agricultural ■ Supply
■ Industry ■ Municipal & Domestic



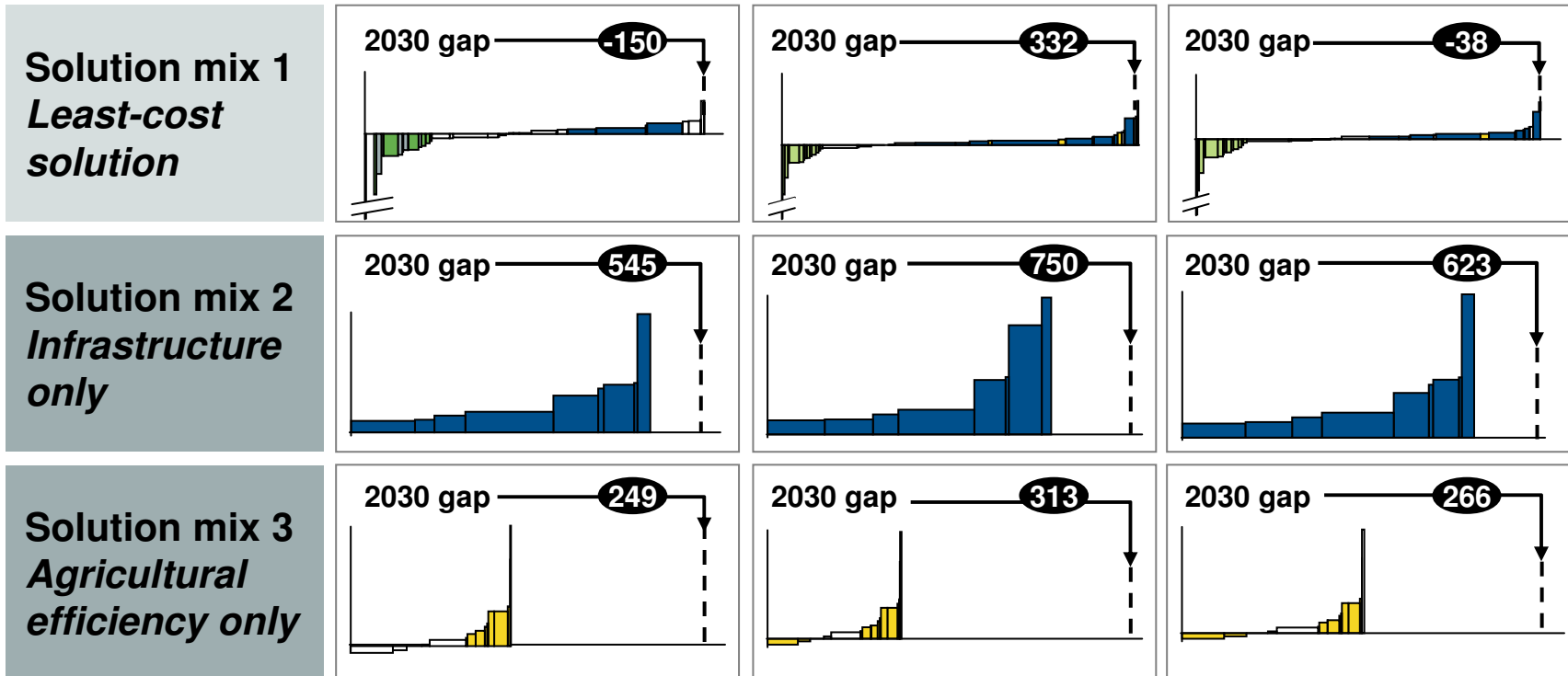
SOLUTIONS

In South Africa, the cost increases with different solution mixes and demand scenarios

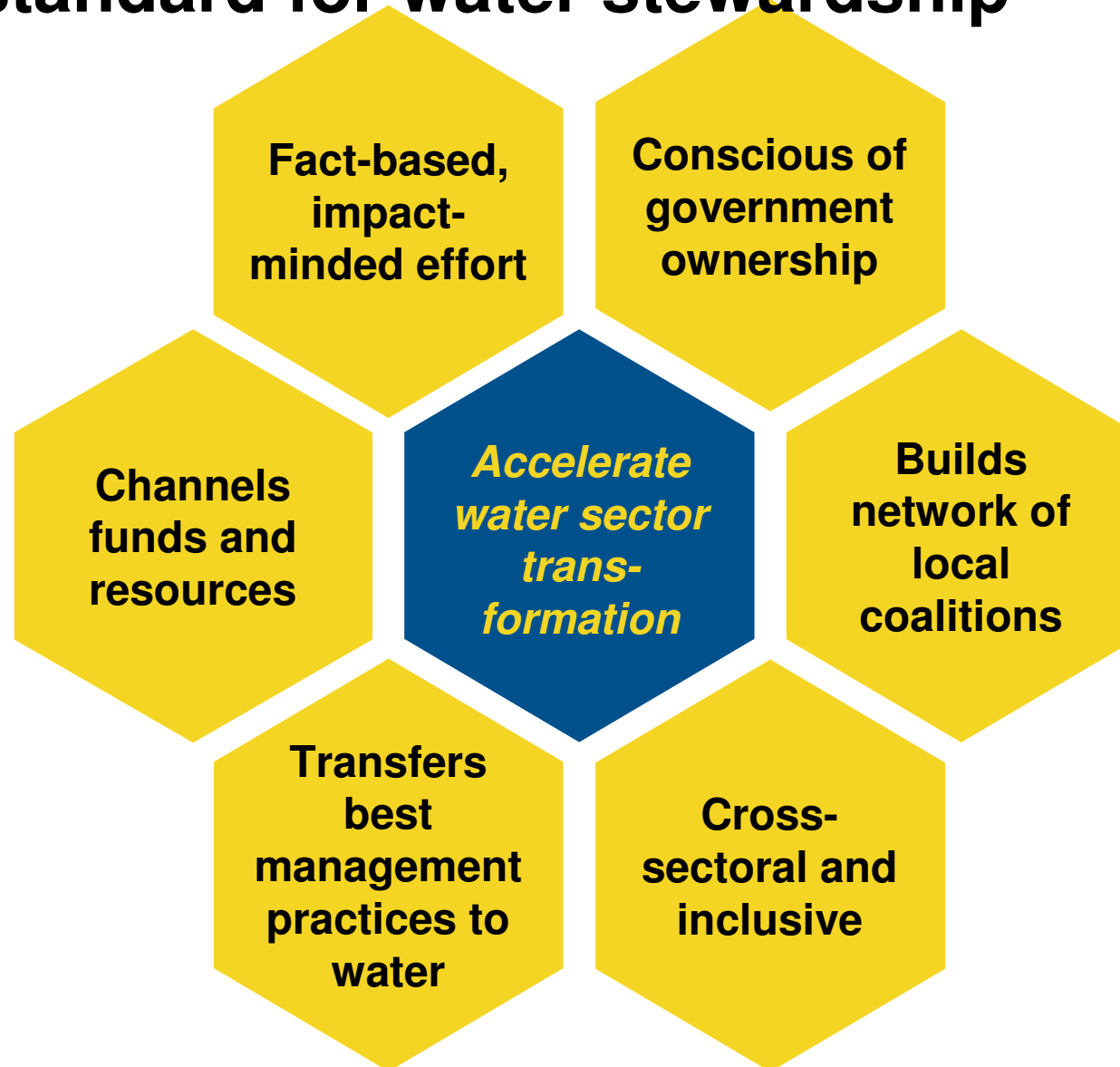
● Net cost of solution, per annum
USD millions



SOLUTIONS



There is need for accelerated sector reform and a new standard for water stewardship



"Charting our water future" has fueled a vibrant debate on how to accelerate much-needed water sector reform

NEXT STEPS

