





# The Challenges We Face



# Macro Trends

Growing Population

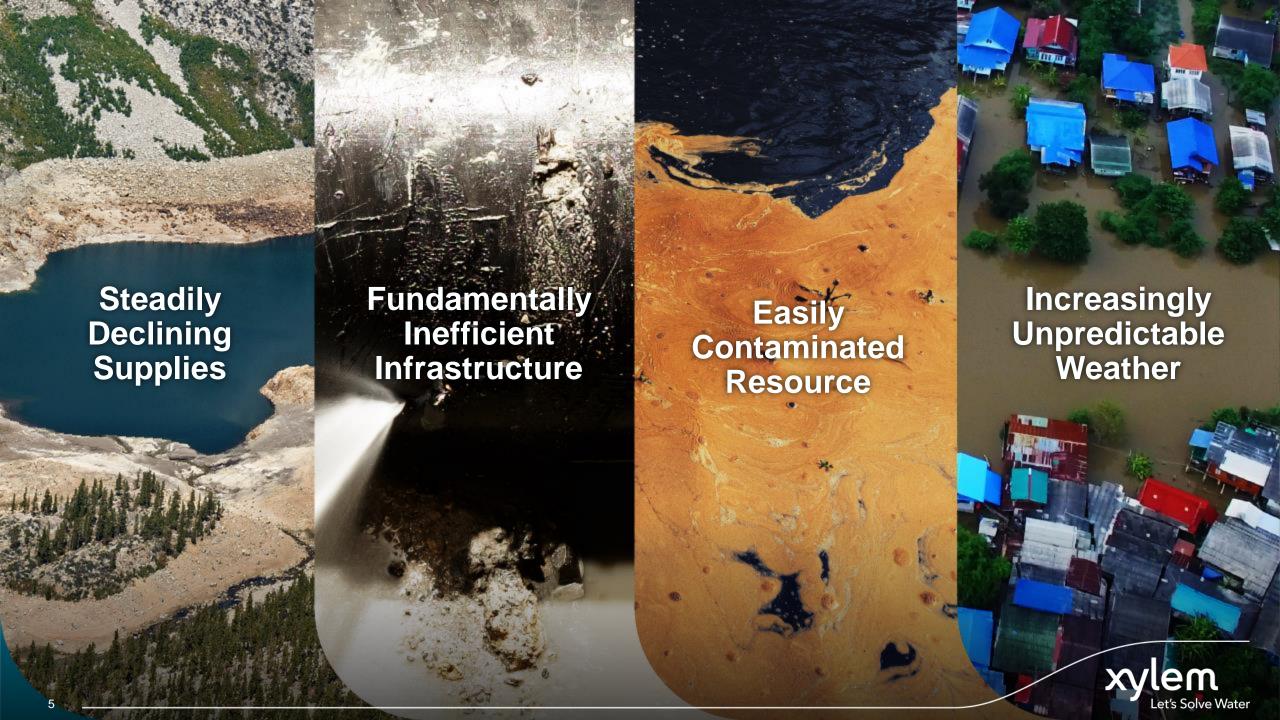














# Who We Are



# We Create Economic and Social Value





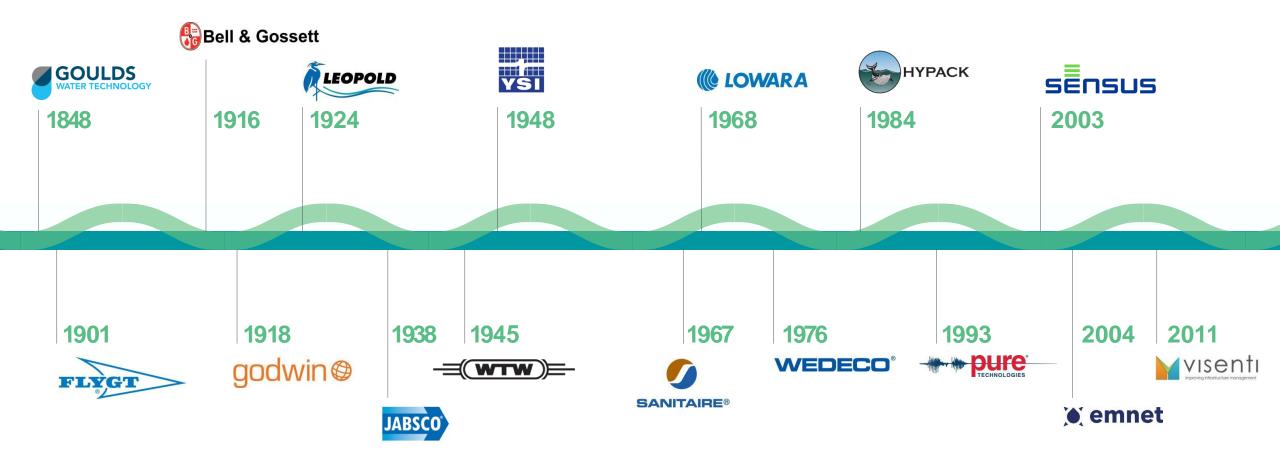
# Let's Solve Water

We are one of the world's leading water technology companies





# We have always brought together the most progressive brands





# Who All Share the Same Values





# What We Do



# How Do We Solve Water?



#### Residential / Industrial / Building Services / Irrigation



Oceans / Lakes / Rivers / Groundwater





### Innovation



Xylem Research & Development Capabilities

- Global R&D Centers
- \$191M R&D Spend
- 2,600+ Engineers
- 3,000+ Patents
- 25% Vitality Index



### **New Business Models**

From То CapEx **OpEx** Providing Selling Water Services Equipment Selling Network Network Communication as a Service Equipment 



Advanced Technologies

& Products

#### Concertor®

Most intelligent wastewater pumping system we've ever made

Reduction of cabinet size vs conventional cabinets 50%

Energy saving vs conventional pumping

70%

Inventory reduction

80%





Advanced Technologies

& Products

Integrated ball valve for remote service turn-on, shut-off or restricted use.

**3-State Flow Control** 

Maximize return on investment with longer meter life and meter accuracy guaranteed for

15 years

Capture greater revenue with low-flow accuracy able to register as low a

0.11 GPM



The smartest residential water meter working for you in the field in near-real-time.





# We Are a Technology Company – Cyber Security Comes Standard



Connected, smart devices are growing at an exponential rate.



At Xylem, we recognize the risks associated in a connected world.



Cyber threats rapidly evolve and expand, with potential to disrupt business operations.

Xylem actively addresses cyber risks through a team of dedicated cybersecurity professionals

- Deploying advanced attack detection and prevention
- Offering a variety of cybersecurity features
- Tracking, identifying and proactively addressing ever-evolving cybersecurity threats
- Independently validating security with industry recognized certifications



# Key Investment Priorities

Strengthen Our Core











# Culture of Sustainability 2025 Signature Goals



Save more than 16.5 billion cubic meters (m³) of water through advanced technologies that avert water loss and enable water reuse



Use 100% renewable energy and process water recycling at Xylem's major facilities



Prevent over 7 billion m³ of polluted water from flooding communities or entering local waterways



Ensure that 100% of Xylem employees have access to clean water and safe sanitation at work, at home and during natural disasters



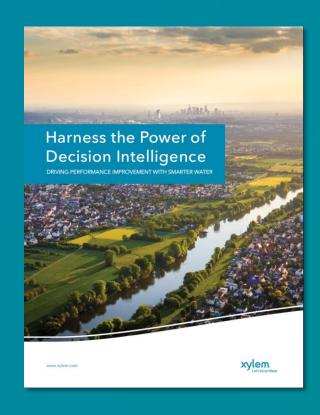
Provide access to clean water and sanitation solutions for at least 20 million people living at the base of the global economic pyramid



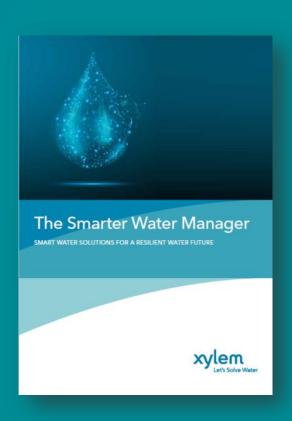
Give 1% of Xylem employees'
time and 1% of company profits
to water-related causes and
education

# Sharing Our Ideas with the Industry

Thought Leadership









# And Being Recognized for it

Fortune's Changing the World Companies

Barron's
Most Sustainable
Companies









# Watermark's Achievements

When Corporate Social
Responsibility and
Employee / Customer /
Stakeholder volunteer together
to create community value

People whose lives have benefited 4.2 Million+

Volunteer hours pledged (2016-2019)

180,000+

Annual events

950+





#### Watermarks Mission

to provide education and access to safe water to ensure healthy lives, gender equality and resilient communities.



Nurture healthy lives by reducing health risks from unsafe drinking water around the world



Promote gender equality in water scarce nations and break down barriers to education for women and girls



Build resilient communities in the face of mounting water challenges, climate change and natural disasters

### AREAS OF FOCUS to create powerful social impact that changes lives

Awareness & Education

Employee & Stakeholder Engagement Disaster Response

Innovation & Collaboration





# Our Global Partners



























### WATER CHALLENGES ARE







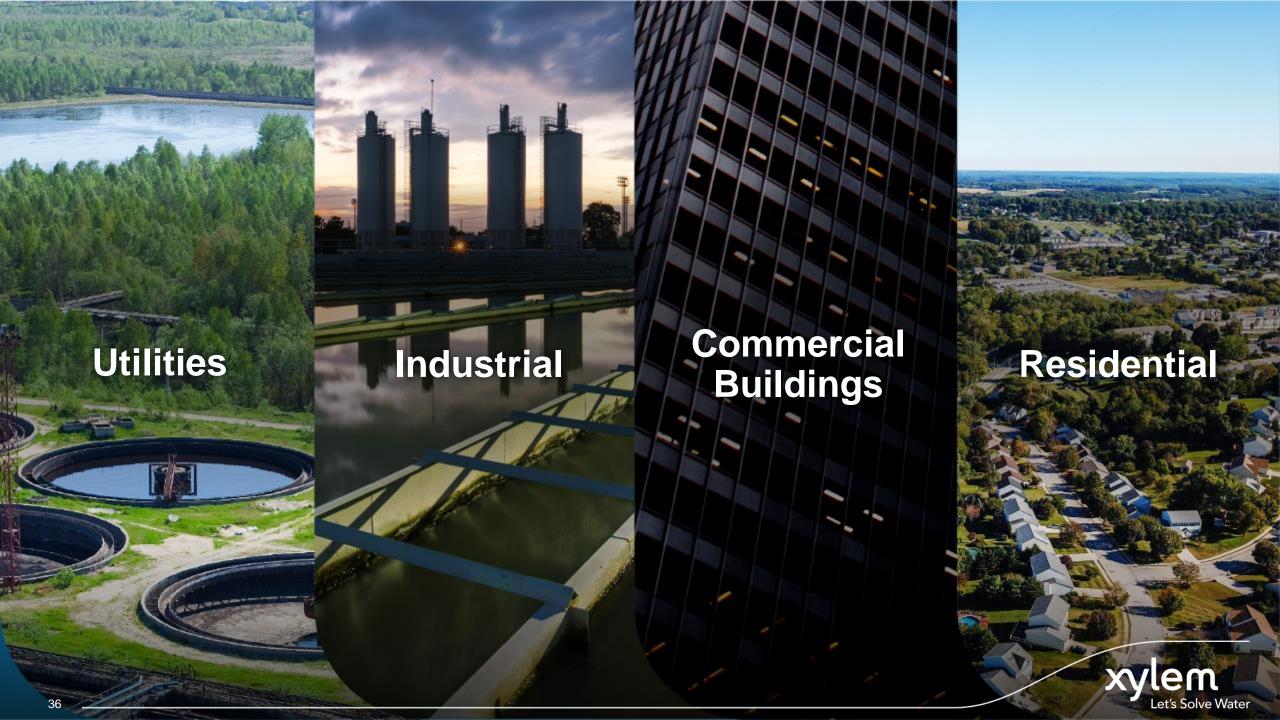
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# Solving Your Challenges





# 2019 Revenue

Utilities

~50%

Industrial

~35%

Commercial Buildings

~10%

Residential

~5%





Industrial

Commercial Buildings

Residential



### Challenges: Water Utilities

1

#### **Stressed Water Supply**

#### Issue

Maintain the health of traditional water sources and execute a water source diversification strategy

#### Solution

Xylem's leading-edge technologies monitor, pump and treat water from all sources and enable water reuse

2

#### **Aging Infrastructure**

#### Issue

Effectively assess and identify high risk areas for repair/replacement before problems occur

#### Solution

Xylem's intelligent pipeline and critical infrastructure services perform condition assessment, identify defective assets and bypass services and replacement technologies reduce or eliminate combined sewer overflows and leaks/non-revenue water

3

#### **Stormwater & Flooding**

#### Issue

Significant increase in severe weather patterns cause flooding and related damages

#### Solution

Xylem's flood management solutions include sensors for early warnings, dewatering for disaster response, communications for recovery and submersible pumping for resilient infrastructure

4

#### **Regulatory Compliance**

#### Issue

Successfully comply with a growing body of compliance regulations

#### Solution

Xylem's analytics and sensors evaluate a broad range of water quality parameters, and our technologies treat water and wastewater to meet regulatory standards 5

#### Non-Revenue Water

#### Issue

Reduce persistent and costly water losses from leaks and faulty meter readings

#### Solution

Xylem's broad portfolio of solutions monitor for and identify water leaks, as well as faulty meters. Its communications network enables point-to-multipoint communications throughout the network.



# Operating Strategy, Costs & Labor

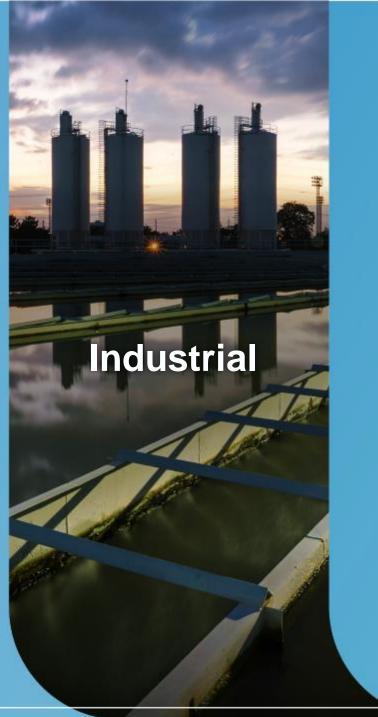
#### Issue

Lower operating and energy costs, and leverage new revenue opportunities

#### Solution

Xylem's industry-leading pumping and treatment solutions for energy efficiency, and software-enabled solutions to optimize operations and identify revenue opportunities





Commercial Buildings

Residential



# Challenges: Industrial

1

#### **Water Quality and Scarcity**

#### Issue

Control inefficient operations due to unreliable water supply

#### Solution

Xylem's technologies ensure water can be extracted, treated, and transported from multiple sources at the desired pressure and quality

3

# Operational Continuity & Efficiency

#### Issue

Reduce losses from unplanned downtime and production interruptions

#### **Solution**

Xylem's application-based expertise solves the most complex requirements and designs water management solutions that provide more value today and tomorrow 2

#### **Connectivity & Automation**

#### Issue

Use IoT to improve water management efficiency and reduce costs

#### Solution

Xylem's smart solutions use real time monitoring and powerful data analytics to turn water from a necessary expense to a strategic advantage

3

#### **Regulatory Compliance**

#### Issue

Reliable waste management is essential to successfully meet environmental and discharge regulations

#### Solution

Xylem's analytics and sensors evaluate a broad range of water quality parameters, and our technologies transport and treat wastewater to meet regulatory standards



**Utilities** 

Industrial



Residential



# Challenges: Commercial Buildings

1

Efficient and reliable removal of wastewater, stormwater and excess drainage

Use case

Preventing sewage backup

#### Solution

Reliable wastewater drainage technology, self-cleaning submersible sewage pumps, versatile dewatering solutions, adaptive pump stations

3

Responding quickly and effectively to fire

Use case

Preventing damage due to fire

#### Solution

Automatic fire suppressant solutions, independently powered back-up pumping systems, portable wastewater drainage

2

Maintaining consistent water temperature and pressure

Use case

Increasing comfort of building

#### Solution

Economical, wide-scale HVAC, systems, reliable booster systems, precise, variable speed pump controllers, heat transfer products adaptive water pressure solutions



**Utilities** 

Industrial

Commercial Buildings



# Challenges: Residential



Efficient and reliable removal of wastewater, stormwater and excess drainage

**Use case**Preventing sewage backup

#### Solution

Reliable wastewater drainage technology, self-cleaning submersible sewage pumps, versatile dewatering solutions 2

Maintaining consistent water temperature and pressure

Use case

Increasing comfort of building

#### Solution

Water pressure systems, reliable booster systems, precise, variable speed pump controllers, adaptive flow technology, wet-rotor circulators and heat pumps



