

## BUSINESS AREA 8

---



### Water Supply & Management

Water management in Spain, including irrigation systems and hydraulic power generation, is a key element of economic development. Spain has various agencies specializing in water resource management, sustainability and protection, in line with the EU's water framework. Spain, country with the highest number of reservoirs per capita worldwide, has a decentralized water management system, allowing each region to have a high level of water management autonomy.

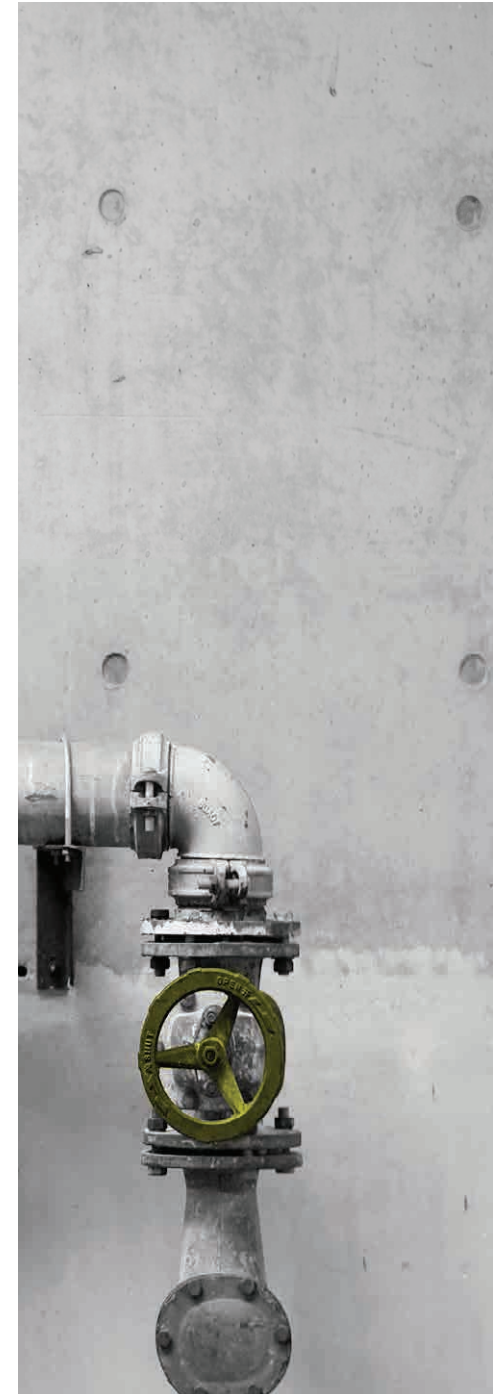
Within Spain, the Region of Murcia is an example of comprehensive management, both in terms of water protection and resource optimization. One of the aims is to support agriculture, one of the region's key sources of wellbeing and wealth. In fact, Murcia is the leading Spanish region in water treatment and reuse per person, using over 90% of treated water for farming irrigation. Furthermore, the region recently undertook an ambitious plan to upgrade its piping system and reduce water losses in more than 15%. Our commitment to save every single drop is clear.

As for employment in the water industry, it is rather stable and qualified. Technology levels in urban water services in Murcia, similarly to the rest of Spain, are amongst the best in Europe. Water utilities have implemented multiple improvements and modern technologies in all areas, such as hydraulic techniques, treatment and purification processes and sensing and remote control methods, among many others. This technological optimization has favored a significant water treatment cost reduction while maintaining water quality levels.

Research is another field in which the region has made considerable efforts, enhancing process knowledge and developing products which have positioned Murcian companies as sectoral references. Many countries with a water deficit implement processes and purchase technology developed in our region. This technological progress in water resources allows Murcia, main agricultural producer in the country, to be one of the Spanish regions which consumes less water, according to survey by INE (Spain's National Institute of Statistics).

Murcian firms in this industry lead the implementation of new control and management technologies, being firmly committed to moving ahead with the fourth industrial revolution digitization process. The Region of Murcia, national and international water management reference, has turned its need for water into a competitive advantage through the creation of companies specializing in water resource management.

These companies are known for their innovative capacity and high levels of technology exports, even to leading water management countries such as Israel and Chile. In fact, Murcia is the second Spanish region in the export of greenhouses (13% of the national total) and the first in the export of specific agriculture machinery, mainly sprayers (18% of the national total).



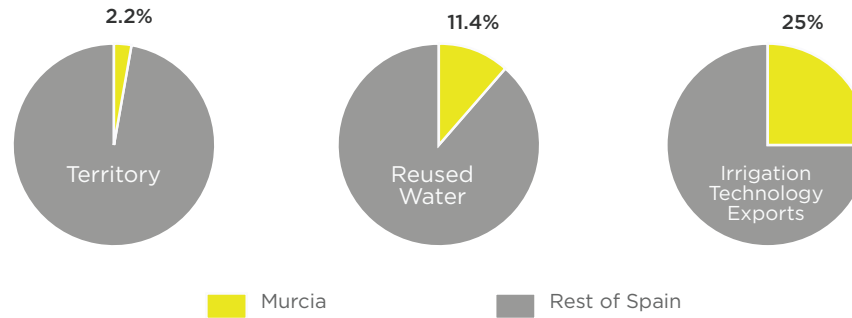
## BUSINESS AREA 8



### Water Supply & Management

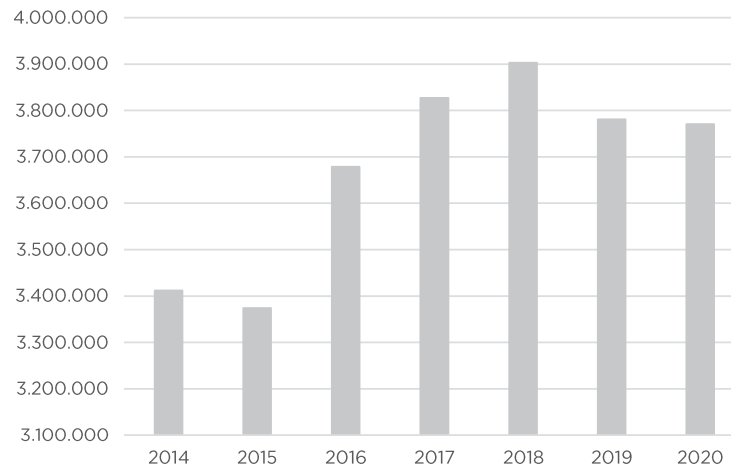
Murcia is the leading Spanish region in water treatment and reuse per person, using over 90% of treated water for farming irrigation.

### Murcia's Contribution to Spain

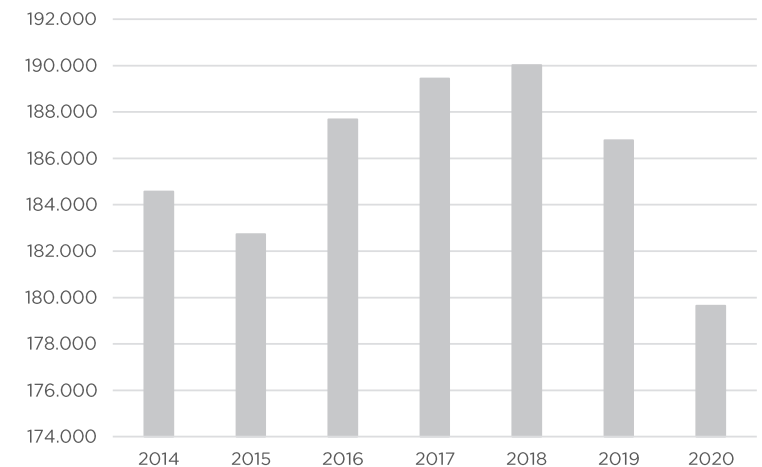


Source: INE (Spain's Statistics Agency) and Europa Press

### Production Obtained (Metric Tons)



### Water Consumed (m³)



Source: Regional Ministry of Water, Agriculture, Livestock, Fisheries and the Environment

### INDUSTRY HIGHLIGHTS

It is important to consider that water scarcity is an increasingly frequent phenomenon and a worldwide concern. It is currently calculated that such scarcity affects **40 % of the world's population**, a percentage expected to increase to two thirds by the year 2050. **Murcia is prepared to face this increasing challenge.**

Murcia companies are known for their innovative capacity and high levels of technology exports, even to leading water management countries such as Israel and Chile. Some key companies in this industry include **Grupo Wind, Hidroconta** and **BEL Composites.**

**Firms specializing in the water resource industry have a yearly turnover of some €750 million and employ 5,000 people.**