

WELCOME TO ECOLAB!

Own your future. Impact what matters.





Company Overview

Ecolab and Nalco Water, an Ecolab Company



Own your future.
Impact what matters.

We Are a Global Company with Global Reach

Founded in
1923

Headquartered in
St. Paul, MN

48,000+
global associates*

FORTUNE
250
company

119
manufacturing
facilities

1M+
customer
locations

\$13B
in 2016 sales

19 global
technology
centers

8,100
patents

Serving customers in
170+ countries

*25,200 sales-and-service people, 1,600 RD&E scientists, engineers and technical specialists

Ecolab is the global leader in water, hygiene and energy technologies and services that protect people and vital resources.



The Biggest Challenges Facing the World Today

POPULATION GROWTH

50% more
people by 2050

GROWING MIDDLE CLASS

More disposable
income, diet shifts

No matter when, no matter where...

**the world will always need clean water, safe food,
abundant energy and healthy environments**

AGING POPULATION

Will shift
consumer behavior;
drive healthcare

RESOURCE SHORTAGES

And greater
demand for water,
energy and food

Ecolab Impacts What Matters by Taking These Challenges Head-on

CLEAN WATER

- Help manage 1.1 trillion gallons of water
- Help conserve 161 billion gallons of water



ABUNDANT ENERGY

- Help fuel 550 million vehicles globally
- Help enable 22% of electricity generation and 40% of nuclear power while reducing environmental impact



SAFE FOOD

- Help make 27% of the world's processed foods safe
- Help ensure 42% of the global processed milk supply is produced hygienically



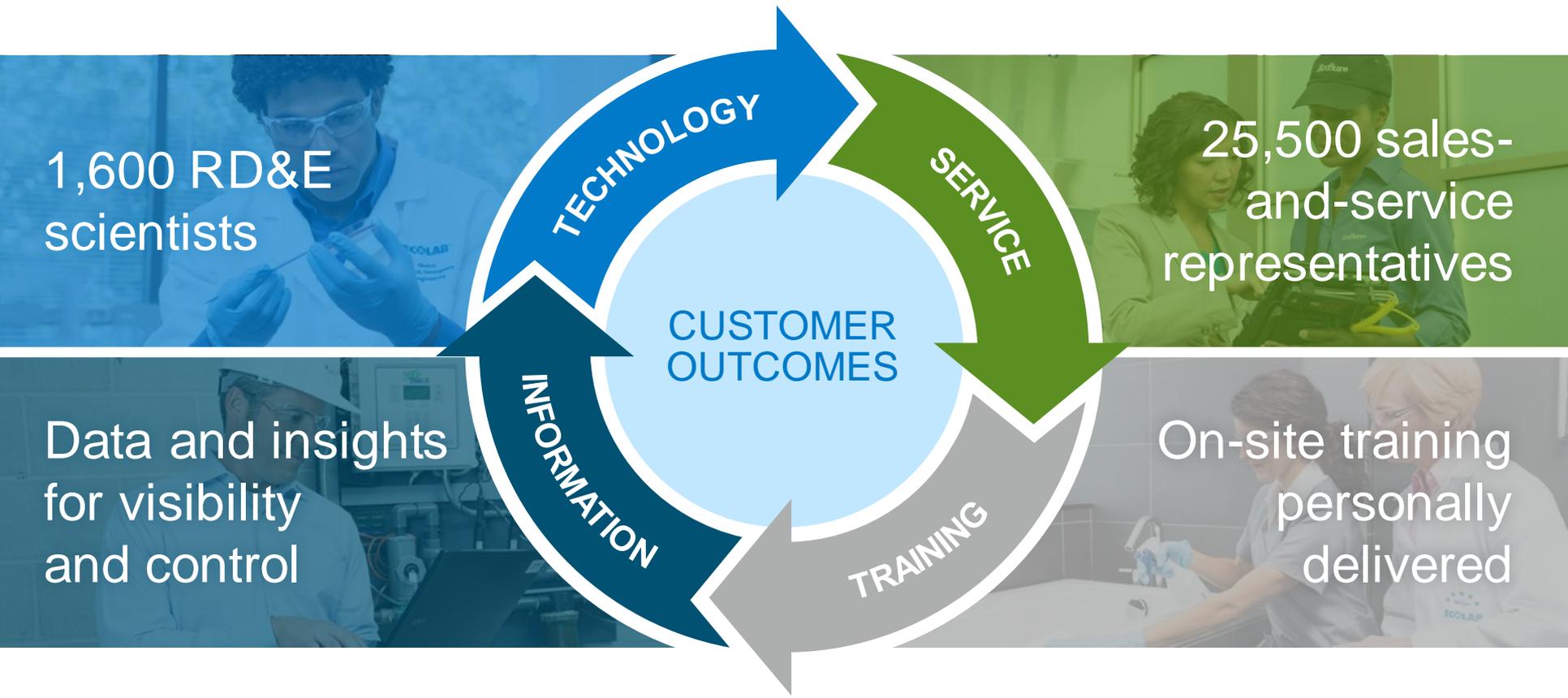
HEALTHY ENVIRONMENTS

- Help clean 31 billion hands each year
- Help clean 113 million loads of linens each year



We Use Programs to Achieve Customer Outcomes...

We leverage over a century's worth of experience in superior chemicals, innovative technology and unparalleled service to continuously deliver on customer outcomes...



Nalco Water

Addressing the World's Water Challenges

NORTH AMERICA

2016 Nalco Water Field Associates
9 Manufacturing Plants
6 RD&E Facilities

EUROPE, MIDDLE EAST & AFRICA

1100 Nalco Water Field Associates
17 Manufacturing Plants
4 RD&E Facilities

ASIA PACIFIC

1484 Nalco Water Field Associates
14 Manufacturing Plants
6 RD&E Facilities

LATIN AMERICA

877 Nalco Water Field Associates
6 Manufacturing Plants
5 RD&E Facilities

Nalco Water – Focused on Industry Expertise

4 Global Divisions

LIGHT
Industries

HEAVY
Industries

Mining

Paper

9 Global Industries

F&B | Manufacturing | Institutional | Transportation | Power | Metals | Chemicals | Mining | Paper

5 Core Platforms

Pretreatment | Cooling Water | Boilers | Process | Post-treatment

>170 Countries

The Need for Our Expertise Is Increasing

By 2030, the world will need:

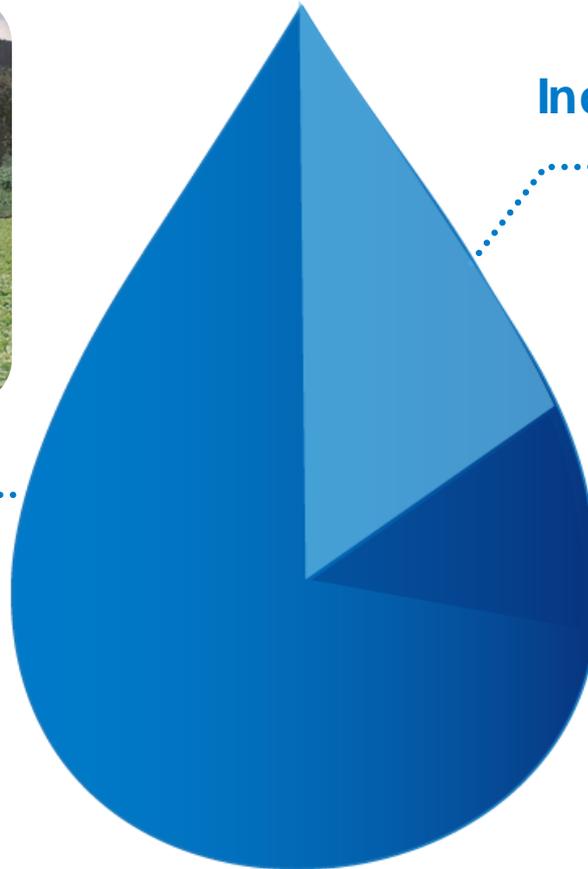


And exponentially more ways to stop the spread of disease

Focused on Industry as the 2nd-largest Water Consumer



70%
Agriculture



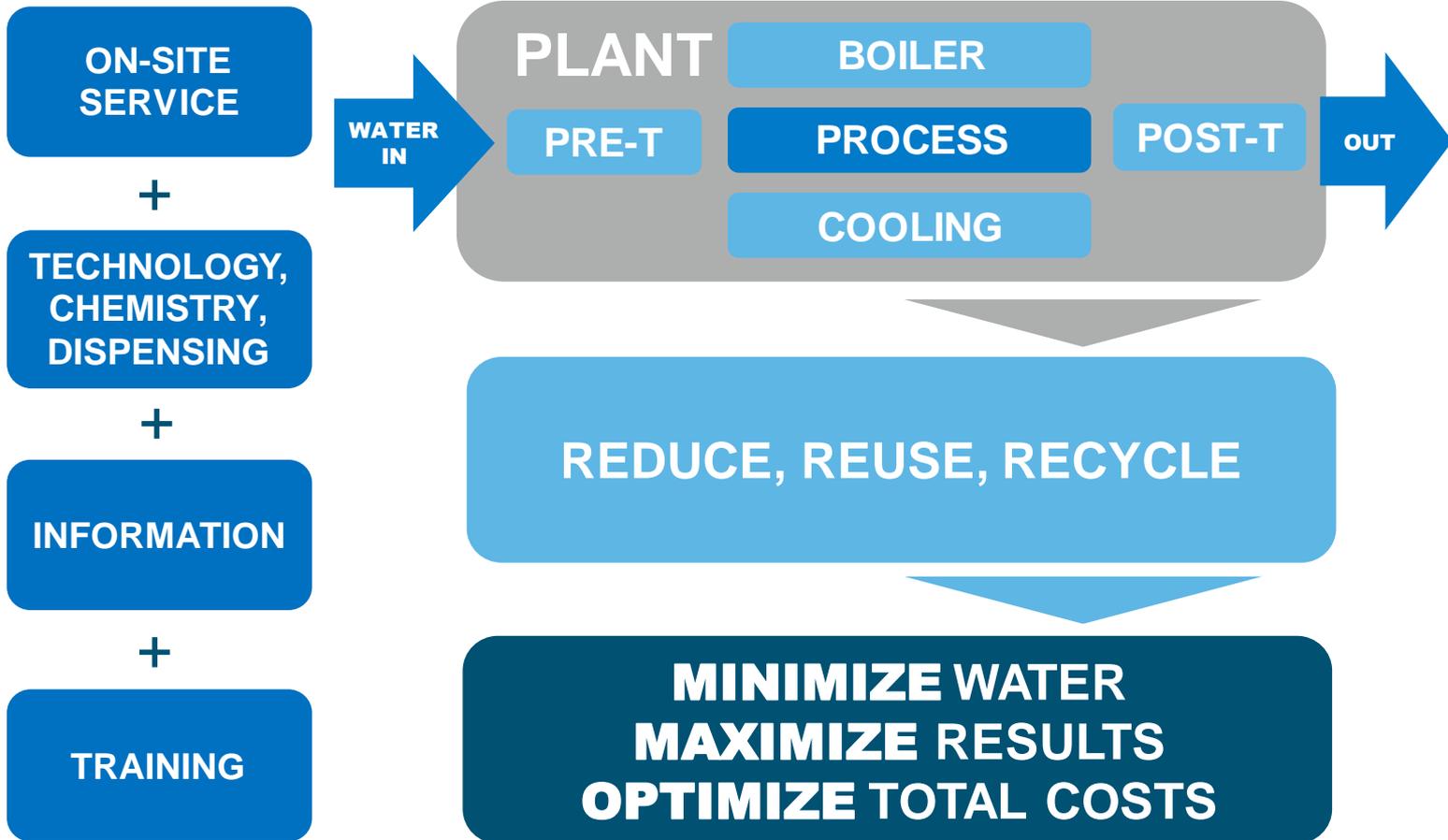
20%
Industry



10%
Domestic



What We Do



5,400 Experts - 40,000 Customers

Helping Customers Meet Aggressive Goals



By 2020, safely return to communities and nature an amount of water equal to what is used in finished beverages and their production



Cut total water intake by 30% by 2020, compared to 2010 baseline



2020 goal to improve freshwater efficiency by 5%



Further reduce water consumption 20 percent per occupied room by 2020 from a 2007 baseline



Goal to reduce water consumption per guest night by 25% by 2020, 30% in water-stressed areas



Aims to reduce direct water withdrawal per ton of product by 40% by 2015, compared to 2005 baseline



Committed to “zero-discharge” operations as a critical part of a long-term target to build a resource-saving and no-emission management enterprise



15% improvement in water use by 2015 as compared to 2011



Improve the water use efficiency of its direct manufacturing operations by 25% by 2025



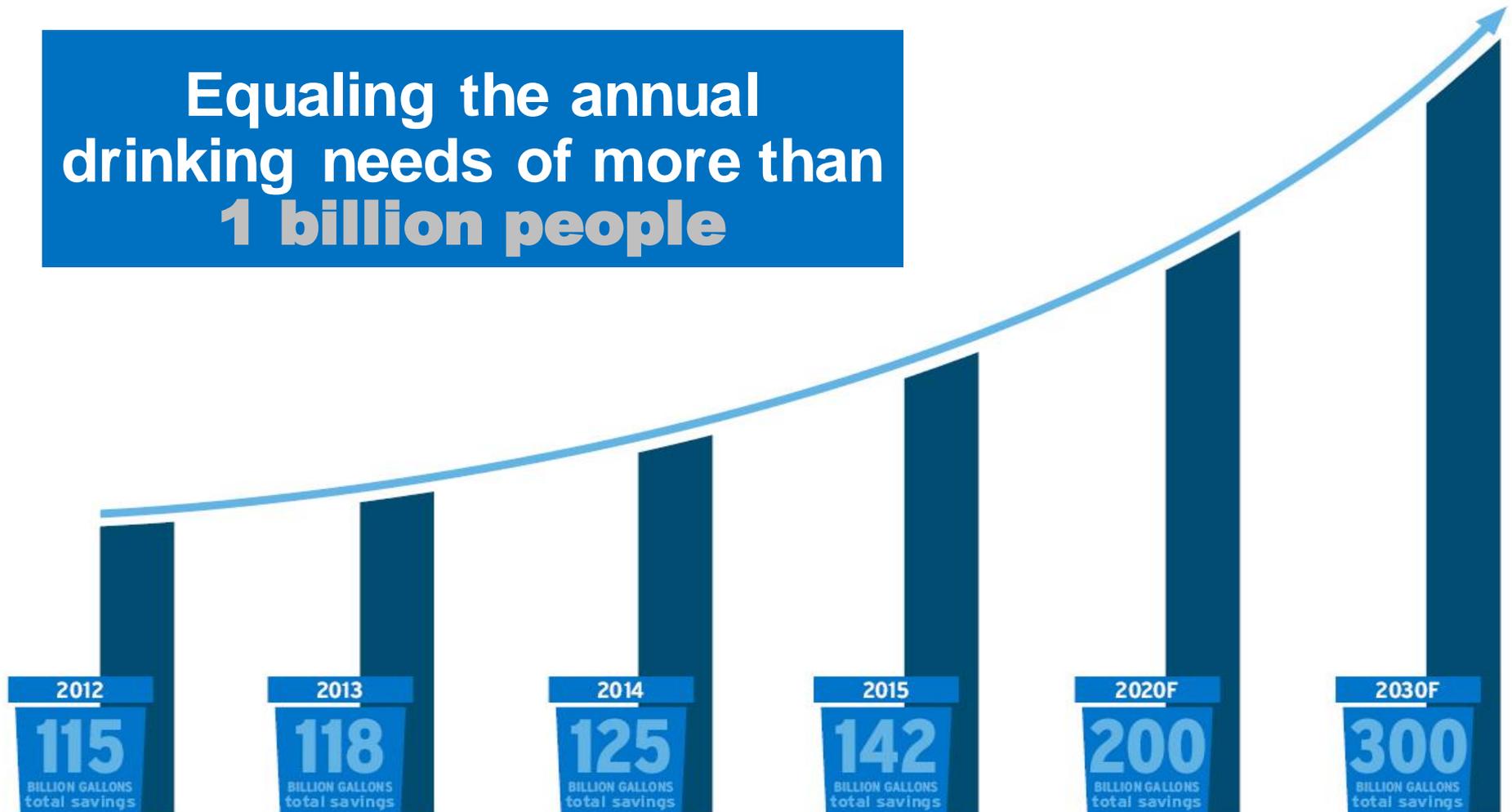
2020 target to reduce water intensity by 15% from 2011 levels



Achieve a further 30% cut in water use per vehicle by 2020

Performance Driven By Water

Equaling the annual drinking needs of more than **1 billion people**

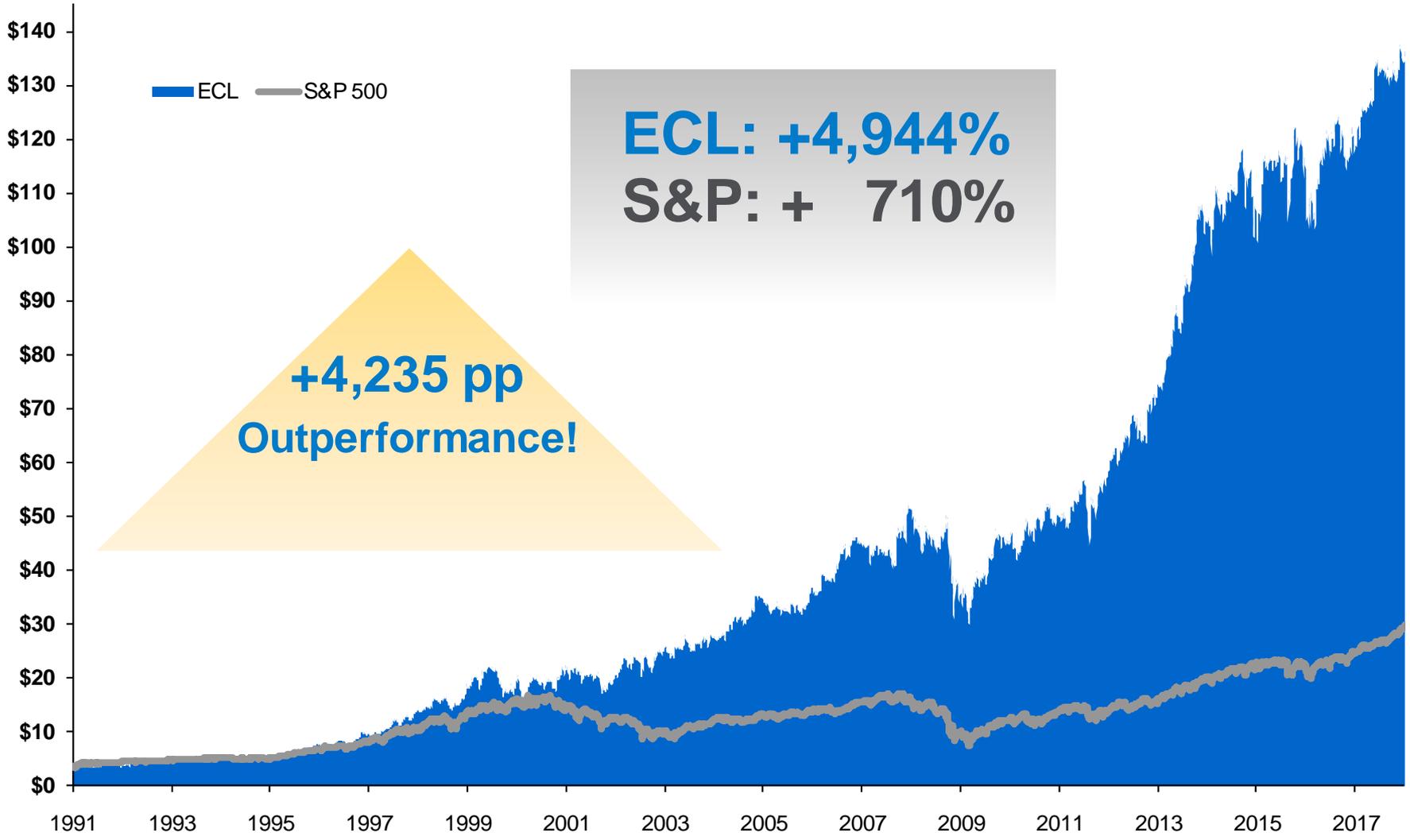




Solving the world's biggest challenges makes good business sense

PERFORMANCE: STRONG LONG-TERM GROWTH

ECOLAB STOCK PRICE December 31, 1990 – December 29, 2017



Own your future.
Impact what matters.

Ecolab Is Recognized for Doing Good



Ranked #3
in Chemicals Industry



11th Consecutive Year



Ranked #6 U.S. 500 List
Ranked #13 Global 500 List



Ranked #10



中国绿公司百强

China's Top 100
Green Companies



Ranked #16

Forbes
America's Best
Employers

Rank #6 in Business
Services & Supplies



Ranked #43



Ranked #50



Ranked #131

MEMBER OF
Dow Jones
Sustainability Indices
In Collaboration with RobecoSAM

2016 North America Index



FTSE4Good

2nd Consecutive Year



Ranked #66



Ranked #35



2015 Change the World List
Fastest Growing Companies:
Ones to Watch



100% Corporate
Equality Index