

Arcadis:
**Global Water
Leader**

Arcadis Investor Relations
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Key Highlights

Arcadis: Global Water Leader



135

Years of
experience



~€550M

Total water solutions
net revenues



Key markets:

US and UK

% of Arcadis Water NR

US: 65% UK: 16% NL: 12%



#1

Global Leader in
water treatment¹⁾

¹⁾ ENR 2024

Arcadis Water Offering

Uniquely positioned for investment programs

Arcadis Water Offering | ~€550 million Net Revenues

Water optimization

NR: ~€350 million



PFAS

NR: ~€100 million

- Groundwater & soil treatment
- Foam transition
- Advisory and litigation support
- Incident response

Climate adaptation

NR: ~€100 million

- Climate risk planning
- Hydraulic design & construction
- Dams & river basins
- Resilient ports & waterways

Key Investment programs

\$15B

Lead Service line identification and replacement (IIJA)

\$24B

Drinking-, Waste-, Storm Water infrastructure (IIJA)

€90B

AMP8 investments

\$10B

IIJA funding for PFAS / emerging contaminants (IIJA)

\$3.5B

Dutch Water authorities for flood protection & water level mgmt

€400M

Flood mitigation (IIJA)

Leading in US and UK in **Water** Optimization

Highlights

- US: touching 100% of the water supply, working in all 22 watersheds
- UK: Long-standing relations with 9 out of 11 water companies
- Integrated offering with sustainability advisory for industrial clients
- Thought leadership driving intelligent solutions

HydroNET **Water Finder** **V O D A**.ai
your water control room An Arcadis Solution

Project example:

Treated over 20,000 l/s water, significantly improving public health and environmental quality

Impact: 60% reduced pollution levels
Client: São Paulo Municipality | Brazil

Client examples



Global technology clients

Regional water authorities

Unique **PFAS** x Water offering

Highlights

- At forefront of regulatory, technical and innovative development
- Global position, reputation and expertise
- Exclusive licensing rights to foam fractionation with ozone
- HRX Well^R: contaminated groundwater treatment below surface

Client examples

- Water utilities
- US Federal clients
- Industrial Manufacturing clients
- Airports

Project example:

Patented ozone fractionation technology successfully removes PFAS from industrial sewer and storm water

Impact: reduce the PFAS to concentrate volume of less than 1% of the original impacted volume, major water mgmt cost savings for the client

Client: Airline Operator | Australia

Climate Adaptation

leader by heritage, expertise and reputation

Highlights

- Global team with strong technical and advisory expertise
- Integrated offerings with Places, Mobility and Intelligence for municipality clients

Client examples

- National water authorities Europe
- US federal clients
- Municipalities

Project example:

Identifying flood mitigation strategies and integrating floodproofing measures into pier restoration plans

Impact: protect more than 15 piers from sea level rise and make 40 acres of land usable

Client: The Port of San Francisco | US



Why clients choose Arcadis

1

Global thought leader

Driving regulations and technology

*Arcadis Water Offering:
Water Optimization*

Proofpoints:

Founding Partner of US EPA's Lead Service Line Replacement Accelerator Program

AI for Water: co-developing new digital solutions with Autodesk

Why clients choose Arcadis

2

Leader in large water asset programs

*Arcadis Water offering:
Water Optimization*



Proofpoint:

Supporting the delivery of the large capital investment schemes such Thames Water and United Utilities within AMP8

Why clients choose Arcadis

3

Combining Sustainability Advisory with operational optimization

*Arcadis Water offering:
Water Optimization*

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Proofpoint:

Driving efficiencies and cost reductions for large industrial clients' facilities: reducing water usage by 30% on average

Why clients choose Arcadis

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Pioneer in Water Technologies

Proofpoint:

In-house developments and partnerships: Water Finder, HydroNET, VODA.ai, Enterprise Decision Analytics, Autodesk

*Arcadis offering:
Water Optimization,
PFAS, Climate Adaptation*

HydroNET V O D A .ai



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