

WATER MARKET IN INDIA 2019

Municipal, Industrial, Desalination & Wastewater Treatment/Reuse

- ❖ Report (PDF)
- ❖ Data-set (Excel)

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Rapid urbanisation and industrial development have led to a significant increase in the demand for water from the municipal and industrial segments. And this demand already far outstrips the available freshwater resources. Over the past few years, the government has paid greater attention to improving water supply and wastewater management practices in urban areas. There has been a surge in activity in terms of launch of new programmes and schemes and project uptake.

In the industrial segment, the demand for water from key consuming segments such as power, textiles, paper & pulp and oil refineries is also increasing steadily. Greater attention is being paid to metering connections, recycling and reusing treated wastewater and ensuring zero liquid discharge.

The private sector has also played a key role in improving efficiency and service delivery. New models for attracting private investments are also being explored and tested. Industries are also exploring alternative sources of water such as treated wastewater and desalinated water to meet their increasing water demand. The role of technology and digital solutions has also evolved.

Going forward, there is a huge scope for improving service delivery and scaling up investments in the water sector. The sector offers many opportunities for private developers, contractors, technology providers, financiers and long-term lenders, equipment and material suppliers.

1. Water Market Overview

- ❖ Size and Growth
 - Municipal
 - Industrial
- ❖ Policy and Regulatory Developments
- ❖ Recent and Emerging Trends
- ❖ City-level Initiatives
- ❖ Freshwater Resource Availability
- ❖ Sources of Water Supply
 - Surface Water
 - Groundwater
- ❖ Demand-Supply Gap
- ❖ New Water Sources (treated wastewater, desalinated water, etc.)
- ❖ Funding Sources
- ❖ Constraining Factors
- ❖ Supply Outlook and Projections
- ❖ Issues and Challenges

- ❖ Investment Projections (till 2024-25)
- ❖ Demand Projections (till 2024-25)
- ❖ Planned Capex of Key Utilities
- ❖ Market Opportunities for:
 - Project Developers
 - EPC Contractors
 - Financiers and Long-term Lenders
 - Technology Providers
 - Equipment and Material Suppliers (pipes, pumps, meters, etc.)
 - Consultants
 - Etc.

SECTION I: MUNICIPAL WATER: SEGMENT ANALYSIS, OUTLOOK AND OPPORTUNITIES

2. Segment Size and Growth

- ❖ Urban Water Supply Sources
- ❖ Piped Water Supply Network
- ❖ City-wise Water Requirement
- ❖ Notable Trends
- ❖ Policy and Regulatory Developments
- ❖ Sewage Generation and Treatment

3. Key Government Programmes

- ❖ Smart Cities Mission
- ❖ Atal Mission for Rejuvenation and Urban Transformation
- ❖ Swachh Bharat Mission
- ❖ Namami Gange Programme
- ❖ Other Schemes/Programmes

For each of the programmes we will cover project scope, investment requirements, financing sources, current status, key completed projects, upcoming tenders, targets and timelines, etc.

4. Project Pipeline and Analysis

- ❖ Overall Project Pipeline
- ❖ Project Pipeline Analysis
 - By Region
 - By State
 - By Stage of Development (ongoing, announced, approved and planned)
 - By Completion Period
- ❖ Expected Capacity Addition
- ❖ Key Upcoming Projects

5. Future Outlook and Market Opportunities

- ❖ Demand Drivers
- ❖ Policy and Regulatory Outlook

6. Cost Structures and Water Tariffs

- ❖ Existing Tariff Structure
- ❖ Water Charges
- ❖ Key Cost Components of Water Supply Systems
- ❖ Production Costs and O&M Expenses: Select Case Studies
- ❖ Recent Tariff Reforms
- ❖ Issues and Challenges

7. Sector Participation: Experience and Potential

- ❖ Formats and Models
- ❖ Experience So Far
- ❖ Key Completed Projects
- ❖ Key Ongoing Projects
- ❖ Revenue Streams
- ❖ Market for By-products
- ❖ Best Practices
- ❖ Constraining Factors
- ❖ Future Potential

8. Metering Water Services

- ❖ Current Market Size
- ❖ Types of Meters Installed (manual, AMR, ultrasonic bulk flow meters, etc.)
- ❖ Experience So Far
- ❖ Recent Initiatives
- ❖ Key Players
- ❖ Innovations and Advancements
- ❖ Future Demand Projections for Meters

9. 24x7 Water Supply

- ❖ Experience So Far
- ❖ Key Pilot Projects
- ❖ Upcoming and Planned Projects
- ❖ Key Successes and Failures
- ❖ Future Outlook

10. Focus on Non-Revenue Water

- ❖ Current Scenario
- ❖ Emerging Trends and Innovations
- ❖ City-level Initiatives
- ❖ Issues and Challenges

SECTION II: INDUSTRIAL WATER: SEGMENT ANALYSIS, OUTLOOK AND OPPORTUNITIES

11. **Segment Size and Growth**
 - ❖ Water Requirement - By Industry
 - ❖ Water Supply Sources
 - ❖ Notable Trends
 - ❖ New Regulations and Guidelines
 - ❖ Effluent Generation and Treatment
12. **Project Pipeline and Analysis**
 - ❖ Overall Project Pipeline
 - ❖ Project Pipeline Analysis
 - By Region
 - By State
 - By Stage of Development (ongoing, announced, approved and planned)
 - By Completion Period
 - ❖ Expected Capacity Addition
 - ❖ Key Upcoming Projects
13. **Future Outlook and Market Opportunities**
 - ❖ Demand Drivers
 - ❖ Policy and Regulatory Outlook
 - ❖ Demand Projections (till 2024-25)
 - ❖ Investment Projections (till 2024-25)
 - ❖ Market Opportunities for:
 - Project Developers
 - EPC Contractors
 - Financiers and Long-term Lenders
 - Technology Providers
 - Equipment and Material Suppliers (pipes, pumps, meters, etc.)
 - Consultants
 - Etc.
14. **Cost Structures and Water Tariffs**
 - ❖ Existing Tariff Structure
 - ❖ Water Charges
 - ❖ Key Cost Components of Water Supply Systems
 - ❖ Production Costs and O&M Expenses: Select Case Studies
 - ❖ Recent Tariff Reforms
 - ❖ Issues and Challenges
15. **Power Sector: Demand Analysis and Projections**
16. **Textile Industry: Demand Analysis and Projections**
17. **Paper & Pulp Industry: Demand Analysis and Projections**
18. **Steel Sector: Demand Analysis and Projections**
19. **Oil Refineries: Demand Analysis and Projections**

Each of the chapters 15-19 will cover

 - ❖ Current Water Consumption
 - ❖ Water Management Initiatives (zero liquid discharge, treated wastewater, desalination, etc.)
 - ❖ Effluent Generation and Treatment
 - ❖ Key Completed and Ongoing Projects
 - ❖ Key Upcoming Projects/Tenders
 - ❖ Projected Water Demand
 - ❖ Issues and Challenges

SECTION III: DESALINATION MARKET: INITIATIVES, ECONOMICS AND FUTURE POTENTIAL

20. **Market Size, Experience and Cost Economics**
 - ❖ Current Capacity (completed and ongoing)
 - ❖ New Policy and Regulatory Initiatives to Scale-up Capacity
 - ❖ Experience So Far
 - ❖ Trend in Capex of Desalination Plants
 - ❖ Cost Components of Desalination Plants
 - ❖ Noteworthy Projects and Select Case Studies
 - ❖ Issues and Challenges
21. **Future Potential and Upcoming Capacity**
 - ❖ Growth Drivers
 - ❖ Planned Capacity of States/Local Utilities
 - ❖ Emerging Requirements of Key Industries
 - ❖ Planned Expansion in Capacity by Key Industries
 - ❖ Key Upcoming Projects and Tenders
22. **Treatment Technologies Market**
 - ❖ Types of Technologies (membrane and thermal)
 - ❖ Key Features (capital cost, land requirement, production cost, plant performance, quality of treatment, etc.)
 - ❖ Current State of Deployment
 - ❖ New Advancements
 - ❖ Issues and Challenges

SECTION IV: WASTEWATER TREATMENT AND REUSE

23. **Experience So Far**
 - ❖ Current Scenario
 - ❖ Key Initiatives
 - ❖ Emerging Trends
 - ❖ New Technologies/Innovations
 - ❖ Issues and Challenges
24. **Future Requirements and Potential**
 - ❖ Growth Drivers
 - ❖ Availability of Treated Wastewater
 - Secondary Treated Wastewater
 - Tertiary Treated Wastewater
 - ❖ Key Upcoming Projects/Initiatives
 - ❖ Future Outlook and Potential
25. **Select Case Studies (Industrial and Municipal) and Impact**
 - ❖ Recycle/Reuse Initiatives
 - ❖ Infrastructure Created (tertiary treatment plants, collection and distribution infrastructure, etc.)
 - ❖ Sources of Wastewater Supply (municipal agencies/own internal wastewater generation)
 - ❖ Cost of Wastewater and Tariffs
 - ❖ Key Benefits
 - ❖ Lessons Learnt
 - ❖ Future Plans

SECTION V: DATABASE OF KEY PROJECTS

A comprehensive excel-based database of ongoing and upcoming projects in the municipal and industrial water supply segments.

Each project will provide information on:

- Scope
- Project Cost
- Current Status
- Segment (Municipal or Industrial)
- Mode of Implementation (PPP or EPC)
- Contractor/Developer
- Equipment Supplier (wherever available)
- Funding Sources (wherever available)
- Expected Capacity Addition
- Expected Completion Date

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