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WATER IN INDIA 2020

Emerging Trends, Impact of Covid-19, Opportunities and Demand Outlook

- ❖ Report (PDF)
- ❖ Data-set (Excel)

India Infrastructure Research has recently released the latest edition of the Water in India report 2020. The report covers:

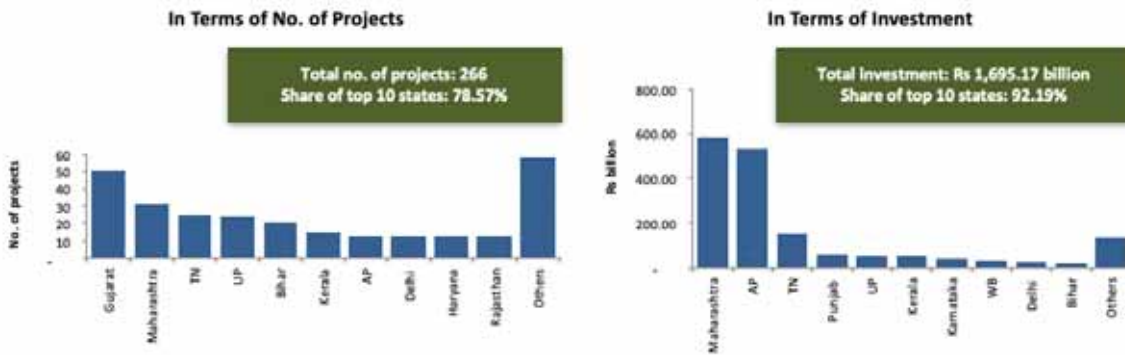
- ❖ Analysis of the market trends, key developments and outlook for the water sector in India
- ❖ Analysis of the current size and growth prospects for key segments - Municipal, Industrial, Desalination and Wastewater Treatment and Reuse
- ❖ A realistic assessment of the short-term, medium-term and long-term impact of COVID-19 on water sector projects and investments
- ❖ Recent government initiatives to expand the water infrastructure and update on key government programmes
- ❖ Noteworthy wastewater recycle and reuse, desalination, and water management initiatives and practices
- ❖ Upcoming investment opportunities for the stakeholders across various segments
- ❖ Near, medium and long-term outlook for the key segments in water sector

INDIA INFRASTRUCTURE RESEARCH

Report Summary and Key Insights

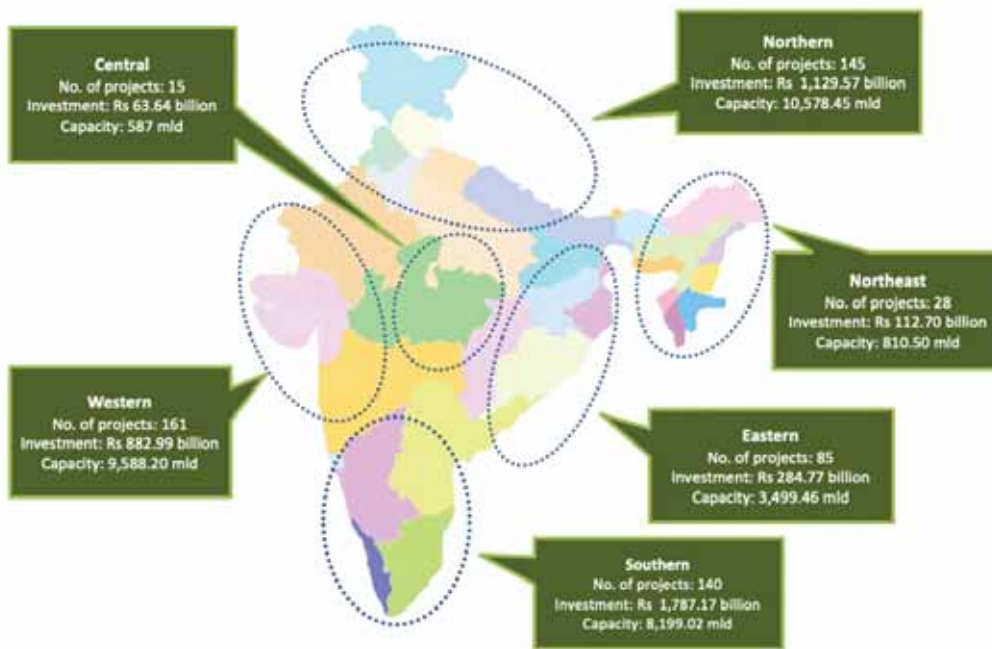
- Rapid urbanisation and steady economic growth are increasing the demand for water, thereby increasing the sewage generated. The demand for water in Class I and Class II cities is expected to increase to 110,000-120,000 mld by 2025 and sewage generation is expected to increase to over 87,000-97,000 mld by 2025. On the other hand, the industrial demand for water is expected to increase multifold, with a larger share coming from water-intensive sectors such as power, steel, paper and pulp, steel and oil refineries.
- In view of the growing demand for water for domestic and industrial usage, there has been emergence of new sources of water i.e. desalination, treated wastewater, rainwater harvesting etc. While desalination has come up to be plausible solution to water woes in coastal areas, the use of treated wastewater for non-potable purpose is being encouraged by the government. These sources hold immense potential for easing off pressure on resources of fresh surface water.
- Over the past few years, the water sector in India has witnessed some key trends and developments. There has been an increase in the access to water supply on premises in urban India has increased from only 48% in 1990 to 80.7% in 2018. Private sector participation has increased in areas such as providing 24x7 water supply; setting up STPs, WtE plants and recycling facilities; etc. Besides, advanced technological solutions such as supervisory control and data acquisition systems, geographic information systems, satellite surveillance and remote sensors are being extensively deployed for better management of the water infrastructure.
- The central government has been instrumental in the growth of sector over the past four-five years. It has introduced a plethora of programmes and schemes, namely Namami Gange programme, the Smart Cities Mission and the AMRUT, aimed at improving the water supply and sewerage infrastructure in the country. Recently, the government launched a promising flagship programme, Jal Jeevan Mission, which aims to provide safe and adequate drinking water through individual household tap connections by 2024 to all households in rural India.
- However, the outbreak of Covid-19 pandemic impacted the construction activities in the sector due to migration of labor, disruptions in supply chains, unavailability of raw materials, liquidity crunch etc. To that end, the relief measures announced by the government and invocation of force majeure clause have helped the contractors to sail through the lockdown phases. With the resumption of construction works, the pace of implementation is expected to remain less than pre-Covid levels in the short-medium run.
- Covid 19 has emphasised the need of guaranteed access to safe water and sanitation for all, a goal achievable by integrating decentralised management in India. The sector outlook has been positively widened and the need for building better infrastructure has been reinstated, now more than ever. Hence, industry stakeholders can dwell into significant opportunities in the near future.
- Based on the projects tracked by India Infrastructure Research, the water and wastewater sector offers a lucrative pipeline of at least 266 projects (announced/approved/proposed/planned/under bidding). These projects are expected to entail an investment of Rs 1.7 trillion.
- Considering the increased thrust given to improving the efficiency levels, the use of IT for various aspects of water supply and wastewater management (collection, transportation, treatment, disposal, asset mapping, management, and customer service), is expected to increase significantly in the coming years. Besides, new initiatives need to be taken to attract private investment in the sector. Further, there is a need for improving the finances of ULBs, since the success of PPP projects is largely determined by the financial health of ULBs.

Project Pipeline in terms of No. of Projects and Investment in Municipal, Industrial, Desalination and Wastewater segments (includes planned, proposed, announced & under bidding projects)



Source: India Infrastructure Research

Project Analysis by Region



Source: India Infrastructure Research

- While the entire economy is reviving from the nationwide lockdown, the pace of revival has been different for projects in the water sector as it has been largely dependent on their geography and stage of implementation. While announced projects/projects in the preliminary stages are likely to be delayed the most, the under construction projects have successfully resumed across the country.
- However, the government needs to proactively address the funding issues being faced by implementing agencies and contractors in order to fast-track project implementation. In addition, there is a need to provide monetary stimulus to the sector through attracting funds and grants from the multilateral agencies and extending sovereign guaranteed funds to reinstate the interest of private sector.

SECTION I: MARKET SIZE, IMPACT OF COVID, OPPORTUNITIES AND OUTLOOK

1. Water Market Overview, Growth, and Trends

- ❖ Sector Snapshot
- ❖ Size and Growth
 - Municipal
 - Industrial
- ❖ Emerging Trends
- ❖ Policy & Regulatory Developments
- ❖ City-Level Initiatives & Best Practices
- ❖ Technology Trends & Advancements
- ❖ Sources of Water Supply (Surface & Groundwater)
- ❖ Freshwater Resource Availability
- ❖ New Water Sources (Treated Wastewater, Desalinated Water, etc.)
- ❖ Issues and Challenges
- ❖ Revised Outlook in Light of Covid-19

2. Impact of COVID-19 on Projects and Implementation

- ❖ Progress made by Projects Since April 2020
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 - Project that Have Progressed to Construction Post Award
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 - Project Developers
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 - Equipment and Material Suppliers
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 - Industrial
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- ❖ Sources of Treated Wastewater Supply
- ❖ Cost Components & Tariffs
- ❖ Key Benefits & Cost Savings
- ❖ Future Plans

SECTION VI: DATABASE OF KEY PROJECTS

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

Each project provides information on:

- *Project Name/Scope*
- *Project Cost*
- *State*
- *Current Status*
- *Detailed Status*
- *Segment (Municipal, Industrial, Desalination, Wastewater Treatment)*
- *Mode of Implementation (PPP or EPC)*
- *Implementing Agency*
- *Expected Capacity Addition*
- *Expected Completion Date*

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