



# **WATER INDUSTRY & TECHNOLOGIES**

Laura Carranza



Publisher of

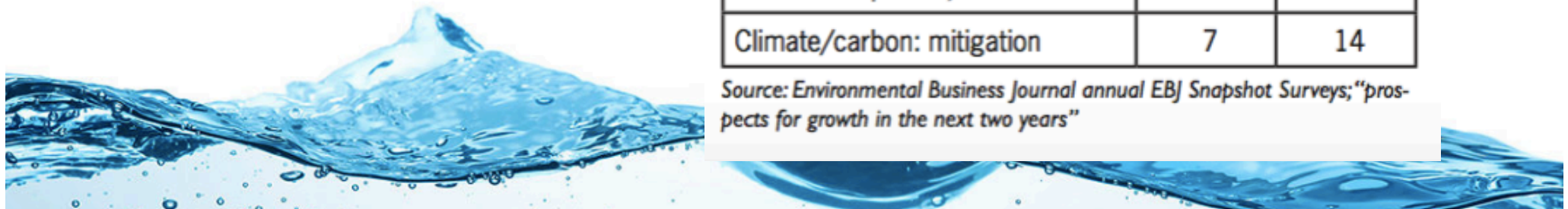
**ENVIRONMENTAL BUSINESS JOURNAL  
CLIMATE CHANGE BUSINESS JOURNAL**

# PROSPECTS FOR GROWTH

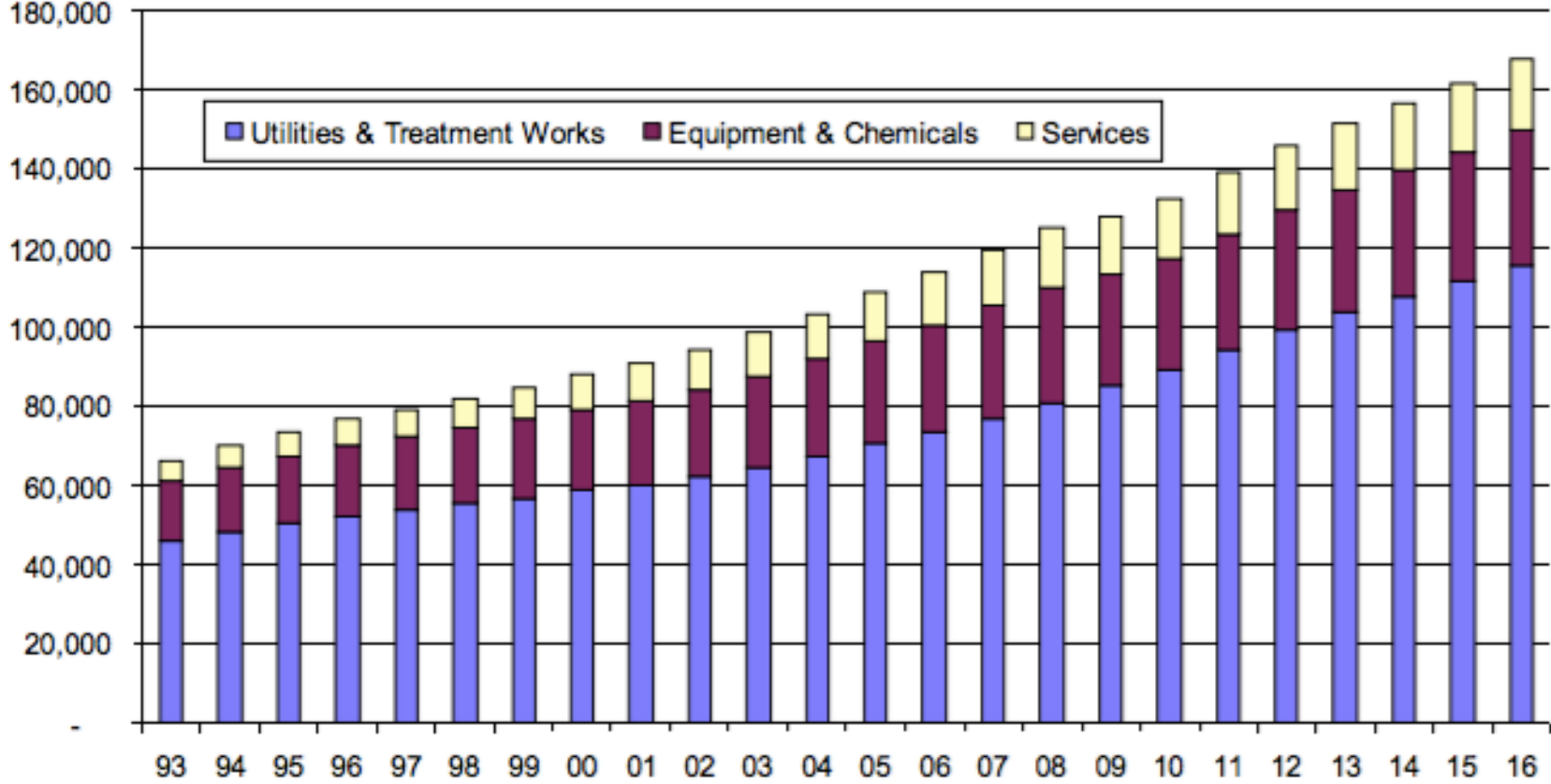
## ***Ranking of Environmental Markets by Media***

	<b>2016 Rank</b>	<b>2017 Rank</b>
Water	4	1
Energy mgmt/efficiency	3	2
Wastewater	10	3
EHS/Industrial hygiene & safety	11	4
Solid waste mgmt	14	5
Natural resources	8	6
Hazardous waste mgmt.	13	7
Remediation	12	8
Sustainability/CSR	9	9
Environmental information	5	10
Renewable energy	2	11
Air quality	1	12
Climate adaptation/resilience	6	13
Climate/carbon: mitigation	7	14

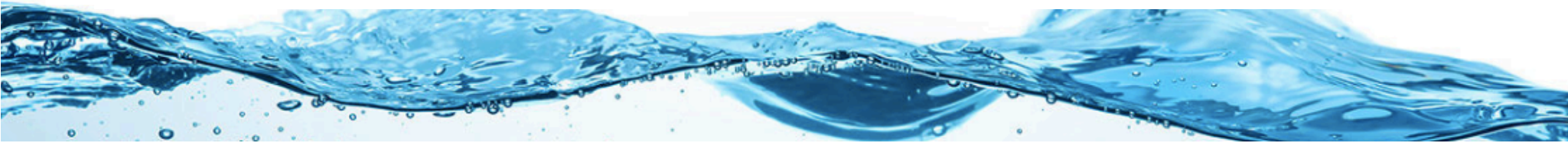
*Source: Environmental Business Journal annual EBJ Snapshot Surveys; "prospects for growth in the next two years"*



**The U.S. Water Industry 1993-2016 (\$mil)**



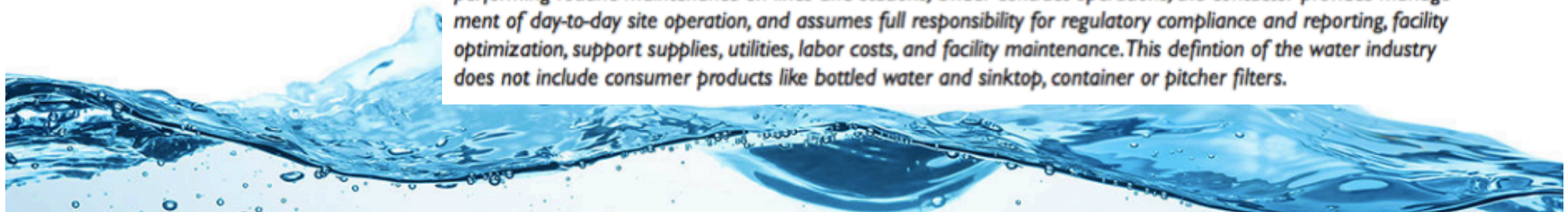
SOURCE: Environmental Business International, Inc., San Diego, CA.



### ***The U.S. Water Industry, 2014-2016***

<b>Water Industry Segments</b>	<b>2014 (\$mil)</b>	<b>2015 (\$mil)</b>	<b>2015 Growth</b>	<b>2016-17 Forecast</b>
Water Treatment Equipment	12,400	12,670	2.2%	3-4%
Delivery & Infrastructure Equipment*	13,370	13,640	2.0%	2-3%
Chemicals (Bulk & Specialty)	4,920	5,020	2.1%	0-2%
<b>Water Equipment &amp; Chemicals</b>	<b>30,690</b>	<b>31,330</b>	<b>2.1%</b>	<b>2-3%</b>
Contract Operations*	3,240	3,320	2.6%	2-4%
Consulting & Design Engineering	10,430	10,790	3.5%	3-5%
Maintenance Services*	2,150	2,200	2.4%	2-3%
<b>Water/Wastewater Services</b>	<b>15,820</b>	<b>16,310</b>	<b>3.1%</b>	<b>3-4%</b>
Instruments	1,370	1,450	5.8%	5-7%
Analytical Services	1,000	1,020	1.5%	1-2%
Wastewater Treatment Works	55,860	57,590	3.1%	3-5%
Water Utilities	51,980	53,770	3.4%	2-4%
<b>Total Water Industry</b>	<b>156,720</b>	<b>161,470</b>	<b>3.0%</b>	<b>3-4%</b>

Source: Environmental Business International, Inc., San Diego, CA. \* Delivery Equipment is pipes, fixtures, pumps and valves for treatment and delivery; Maintenance Service is mostly industrial & municipal plumbing contractors performing routine maintenance on lines and stations; Under contract operations, the contractor provides management of day-to-day site operation, and assumes full responsibility for regulatory compliance and reporting, facility optimization, support supplies, utilities, labor costs, and facility maintenance. This definition of the water industry does not include consumer products like bottled water and sinktop, container or pitcher filters.





# KEY TRENDS

- Increasing Regulation
  - Emerging Contaminants
  - Stronger regulations
  - Enforcement challenge
  - Innovation & Market Growth
- Failing Infrastructure
  - \$11 billion/year – maintain existing infrastructure
  - High Leakage
  - Huge capital investment needed
  - Hard to obtain funds



# KEY TRENDS

- Greater Conservation and Efficiency
  - Demand Concerns
  - Educate General Public
  - Ex: Australia reoriented its agricultural industry
- Focus on Recycling and Reuse
  - Water Consumption vs Drinking
  - Case Studies



# KEY TRENDS

- Steady Growth in Desalination
  - Thermal & filtration
  - Economical only in arid coastal regions
- Interdependence Between Water, Energy & Food
  - Water-Energy Nexus
  - Food-Energy-Water (FEW) Nexus



# KEY TRENDS

- Enhanced Monitoring and Measurement
  - Additional technologies needed for better management
  - Better and quicker information needed
  - Monitoring locations
  - Smart Grids
  - Technological advances
- Residential Consumption Concerns
  - Emerging markets in water monitoring & testing





# KEY TRENDS

- Continuing Surge of Investment in Water
  - Private Equity firms
  - Consistent growth opportunity
  - Profitability
- Impact of Climate Change
  - Changes in distribution





**EBI** ENVIRONMENTAL  
BUSINESS INTERNATIONAL INC.

[www.EBOnline.org](http://www.EBOnline.org)

