

WATER & WASTEWATER CAPITAL IMPROVEMENT PLAN OUTLOOK: TOP 100 U.S. UTILITY PROFILES

Report Published: September 2019

Table of Contents and List of Utilities

About This Data Insight

Over the 10-year period from 2019 to 2028, total capital expenditures (CAPEX) for the top 100 U.S. utilities are projected to total over US\$207 billion. These 100 utilities serve over 86.8 million for water, 86.6 million for wastewater, and 40.7 million for stormwater (*representing 28% percent of the water market and 49% of the wastewater market*). From population growth to the proliferation of digital technologies to climate change, a host of market factors are impacting where utilities spend their dollars.

Whether you are an executive at a utility benchmarking your strategy against your peers or a supply chain company providing services to the water utility sector, this Data Insight will help you understand the strategies and priorities for the top 100 U.S. Utilities.

Report Features

- Profiles of top 100 Utilities across the U.S.
- Capital Improvement Plans for water, sewer, and stormwater infrastructure
- Change in planned CAPEX spend from 2018 to 2019 planning cycles
- Per capita CAPEX for Water & Wastewater
- Spend broken down by water, wastewater and stormwater

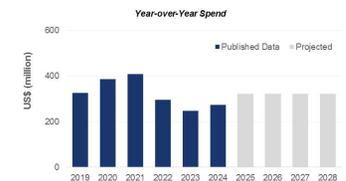
Bluefield Takeaways

- **Wastewater represents the lion's share of utility CAPEX:** Wastewater is projected to comprise 49% of the 10 year total, with water to take up 41%, stormwater 8%, and other CAPEX projects to comprise approximately 2%.
- **Utilities are investing more in water infrastructure, dollars per capita are on the rise.** 52 utilities are projected to spend US\$1 billion or more over this ten-year period, while 48 are projected to spend less than US\$1 billion. 62 utilities are spending more in 2019, than in 2018, while 36 are spending less.
- **Utilities vary in the services they provide, and therefore their CAPEX spend also varies.** Some utilities included water, wastewater, and stormwater, while other municipalities divided those services among multiple utilities. New York City, NY leads in terms of total CAPEX for the ten-year period with over US\$20 billion, and for total wastewater CAPEX at over US\$12 billion.

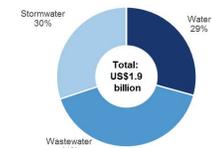
Seattle Public Utilities Department

Utility Details			
Location:	Seattle, WA		
Years of Current CIP:	2019-2024		
	Water	Wastewater	Stormwater
Population Served	1,403,000	686,800	535,00
Service Area (sq. miles)	-	83	83
Mains/Drains (miles)	1,873	1,422	485
No. Treatment Plants	2	-	-
No. Pump/Lift Stations	16	67	-
No. Storage Facilities	105	-	-
Annual Water Distribution (billion gallons)	51	-	-
Treatment Capacity (MGD)	300	-	-

Capital Improvement Program (CIP), 2019-2028

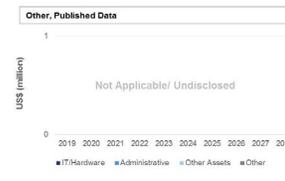
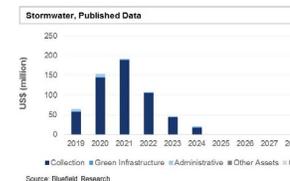
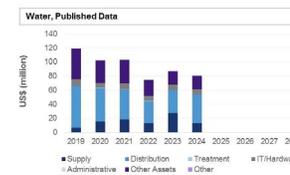


CIP Segmentation, Published Data



Note: All profile information and CIP estimates based on available published data
Source: Bluefield Research

Seattle Public Utilities Department, contir



Sample Profile

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Top 100 U.S. Utilities

- Albuquerque Bernalillo County Water Utility Authority
- Allegheny County Sanitary Authority
- Anchorage Water and Wastewater Utility
- Atlanta Department of Watershed Management
- Austin Water
- Baltimore Department of Public Works
- Billings Public Works Department
- Boise Public Works Department
- Boston Water and Sewer Commission
- Burlington Department of Public Works
- Cedar Rapids (Utilities Department; Public Works Department)
- Central Arkansas Water
- Charleston Water System
- Charlotte Water
- Chicago Department of Water Management
- Cheyenne Board of Public Utilities
- Cincinnati (Department of Water Works; Sewers; Stormwater Management)
- Clark County Water Reclamation District
- Cleveland Department of Public Utilities
- Cobb County-Marietta Water Authority
- Cobb County Water System
- Columbus Department of Public Utilities
- Concord General Services Department
- County of Summit (Department of Sanitary Sewer Services; Storm Water Initiative)
- Dallas Water Utilities Department
- DC Water
- Denver Department of Public Works
- Denver Water
- Des Moines Department of Public Works
- Des Moines Metropolitan Wastewater Reclamation Authority
- Detroit Water and Sewerage Department
- East Bay Municipal Utility District
- El Paso Water Utilities
- Fairfax County (Fairfax Water; Department of Public Works and Environmental Services)
- Falls Church Department of Public Works
- Fargo (Public Works Department; Water Treatment Department; Wastewater Department)
- Fort Worth (Water Department; Stormwater Management)
- Fresno Department of Public Utilities
- Great Lakes Water Authority
- Gwinnett County Department of Water Resources

Key Questions Addressed Throughout the Report

- How much do major utilities across the U.S. plan to spend on CAPEX for the next 10 years?
- Which segments expect the most spend and how has this changed from last year?
- Which infrastructure asset classes (i.e. plants, pipes, pumps, etc.) are slated to see the most investment over the coming years?
- Which utilities are poised for the largest expenditures?
- How do utility per capita spending patterns vary?

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- Hartford Metropolitan District Commission
- City and County of Honolulu (Department of Environmental Services; Facility Maintenance)
- Honolulu Board of Water Supply
- Houston Department of Public Works and Engineering
- Jackson Department of Public Works
- Jacksonville Electric Authority
- Jefferson County Environmental Services
- KC Water
- King County Wastewater Treatment Division
- Las Vegas Valley Water District
- Lincoln Public Works and Utilities Department
- Little Rock Water Reclamation Authority
- Long Beach (Water Department; Stormwater/Environmental Compliance Division)
- Los Angeles (Department of Water and Power, Sanitation, Stormwater)
- Louisville/Jefferson County Metropolitan Sewer District (MSD)
- Louisville Water Company
- Massachusetts Water Resources Authority
- Memphis Public Works Division
- Metropolitan Water Reclamation District of Greater Chicago
- Meridian Public Works Department
- Miami-Dade Water and Sewer Department
- Milwaukee Department of Public Works
- Milwaukee Metropolitan Sewerage District
- Minneapolis Public Works Department
- Mobile Area Water and Sewer System
- Morgantown Utility Board
- Nashville and Davidson County Metro Water Services
- Sewerage and Water Board of New Orleans
- New York City Department of Environmental Protection
- Northeast Ohio Regional Sewer District
- Oklahoma City (Public Works Department; Utilities Department)
- Omaha Department of Public Works
- Philadelphia Water Department
- Phoenix Water Services Department
- Pima County (Regional Water Reclamation; Regional Flood Control)
- Pittsburgh Water and Sewer Authority
- Portland (Water Bureau; Bureau of Environmental Services)
- Portland Water District
- Raleigh Public Utilities Department
- Riverside Western Municipal Water District
- Salt Lake City Department of Public Utilities
- San Antonio Transportation and Capital Improvements Department
- San Antonio Water System
- San Diego County Water Authority
- San Francisco Public Utilities Commission
- Seattle Public Utilities Department
- Shreveport (Water & Sewerage Department; Department of Public Works)
- Sioux Falls Public Works Department
- South Bend Department of Public Works
- Suffolk County Public Works
- Suffolk County Water Authority
- Tampa (Water Department, Wastewater Department, Stormwater Department)
- Trenton Public Works Department
- Tucson Water
- Tulsa (Water and Sewer Department; Streets and Stormwater Department)
- Virginia Beach Department of Public Utilities
- Warwick (Warwick Water Division; Warwick Sewer Division)
- Washington Suburban Sanitary Commission
- Wichita Public Works and Utilities Department
- Wilmington Public Works Department

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