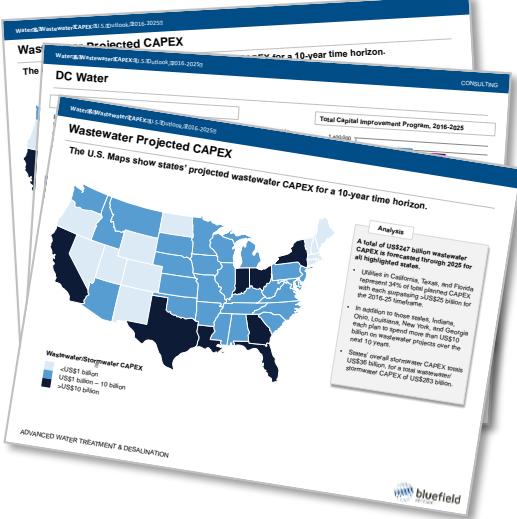


Publication Date: April 2018
Full Report Available for Download

REPORT FEATURES

- 137 slide report (PDF)
- Bottom-up data for utilities, state & regional forecasts (Excel)
- Municipal infrastructure forecasts to 2027, including pipes, plants, pumps, motors, valves, and smart water
- Transparent forecast methodology detailing key data inputs & assumptions
- 100+ in-depth utility company profiles
- Planned CAPEX budgets for facilities, miles of pipe, pumps, water supplies, IT hardware and more
- Regional CAPEX, including new vs. replacement expenditures
- Critical drivers and inhibitors shaping municipal investment in water & wastewater
- State and utility rankings by planned spend, regulatory enforcement

State-by-State Analysis of U.S. Municipal Utility CAPEX



More than 50% of U.S. **municipal** water & wastewater infrastructure is **nearing the end of its useful life**, and the traditional quick fixes by a highly fragmented group of 50,000 public water and 25000 wastewater systems are giving way to a need for more extensive capital expenditures.

Over the next decade, from 2018 to 2027, municipal utilities have set the stage for over **US\$683 billion** in annual capital improvements to address deteriorating piping networks, combined sewer overflows, and rising population demands on treatment plants and distribution networks.

The scope of these utility infrastructure improvements varies significantly by region. Utilities in the east are focused on system rehabilitation and storm water overflows, while new water supplies and drought management activities are more prevalent in the south and west. The market is ripe for new, more efficient infrastructure solutions and improved asset management.

This report is essential for companies requiring data-backed analysis and insights into trends, opportunities, and market forecasts for infrastructure investment across the U.S municipal utility landscape.

WHO SHOULD BUY THIS REPORT

- **Water technology firms** seeking insights into business development and market opportunities
- **Supply chain companies** in need of critical analysis on CAPEX trends and forecasts by utility, state, and region.
- **EPC firms** looking to stress-test their strategies and validate strategic decisions through an unbiased, independent perspective
- **Infrastructure Investors** looking for guidance to support M&A and investment decisions.
- **Financial organizations** requiring transparent analysis of the U.S. municipal utility regulatory environment and key drivers for growth.
- **Utilities** looking to benchmark investment strategies

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KEY QUESTIONS THROUGHOUT THE REPORT

- What is the size and growth potential of the U.S. municipal water infrastructure market?
- Where is the spend forecasted to take place by state and region?
- Which utilities are poised for the largest expenditures?
- How do states and regions vary by new build versus rehabilitation?
- Which sub-segments represent the largest share of spend: pipes, pumps, or plants?
- With a shift toward resiliency how are utilities allocating financial resources?
- What is the impact of consent orders on utility spend over the next decade?
- Which solutions are emerging to slow the widening infrastructure gap?

The report profiles are accompanied by excel spreadsheets supporting each profile.

UTILITIES PROFILED

- 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
- Central Arkansas Water
- Charleston Water System
- Charlotte Water
- Cheyenne Board of Public Utilities
- Chicago Department of Water Management
- City and County of Honolulu (Department of Environmental Services; Department of Facility Maintenance)
- City of Cedar Rapids (Utilities Department; Public Works Department)
- City of Cincinnati (Greater Cincinnati Water Works; Metropolitan Sewers District; Stormwater Management Utility)
- City of Fargo (Public Works Department; Water Treatment Department; Wastewater Department)
- City of Fort Worth (Water Department; Stormwater Management)
- City of Long Beach (Water Department; Stormwater/Environmental Compliance Division)
- City of Los Angeles (Department of Water and Power; LA Sanitation; LA Stormwater)
- City of Oklahoma City (Utilities Department; Public Works Department)
- City of Portland (Portland Water Bureau; Bureau of Environmental Services)
- City of Shreveport (Water & Sewerage Department; Department of Public Works)
- City of Tampa (Water Department; Wastewater Department; Stormwater Department)
- City of Tulsa (Water and Sewer Department; Streets and Stormwater Department)
- City of Warwick (Warwick Water Division; Warwick Sewer Authority)
- Clark County Water Reclamation District
- Cleveland Department of Public Utilities
- Cobb County Water System
- Cobb County-Marietta Water Authority
- Columbus Department of Public Utilities
- Concord General Services Department
- County of Summit (Department of Sanitary Sewer Services; County Engineer 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
- Fresno Department of Public Utilities
- Great Lakes Water Authority
- Gwinnett County Department of Water Resources
- Hartford Metropolitan District Commission
- Honolulu Board of Water Supply
- Houston Department of Public Works and Engineering
- Jackson Department of Public Works
- Jacksonville Electric Authority
- Jefferson County Environmental Services Department
- KC Water
- King County Wastewater Treatment Division
- Las Vegas Valley Water District
- Lincoln Public Works and Utilities Department
- Little Rock Water Reclamation Authority
- Louisville Water Company
- Louisville/Jefferson County Metropolitan Sewer District
- Massachusetts Water Resources Authority
- Memphis Public Works Division
- Meridian Public Works Department
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- Miami-Dade Water and Sewer Department
- Milwaukee Department of Public Works
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- Minneapolis Public Works Department
- Mobile Area Water and Sewer System
- Morgantown Utility Board
- Nashville and Davidson County Metro Water Services
- New York City Department of Environmental Protection
- Northeast Ohio Regional Sewer District
- Omaha Department of Public Works
- Philadelphia Water Department
- Phoenix Water Services Department
- Pima County (Regional Water Reclamation Department; Regional Flood Control District)
- Pittsburgh Water and Sewer Authority
- 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
- Sewerage and Water Board of New Orleans
- Sioux Falls Public Works Department
- South Bend Department of Public Works
- Suffolk County Public Works
- Suffolk County Water Authority
- Trenton Public Works Department
- Tucson Water
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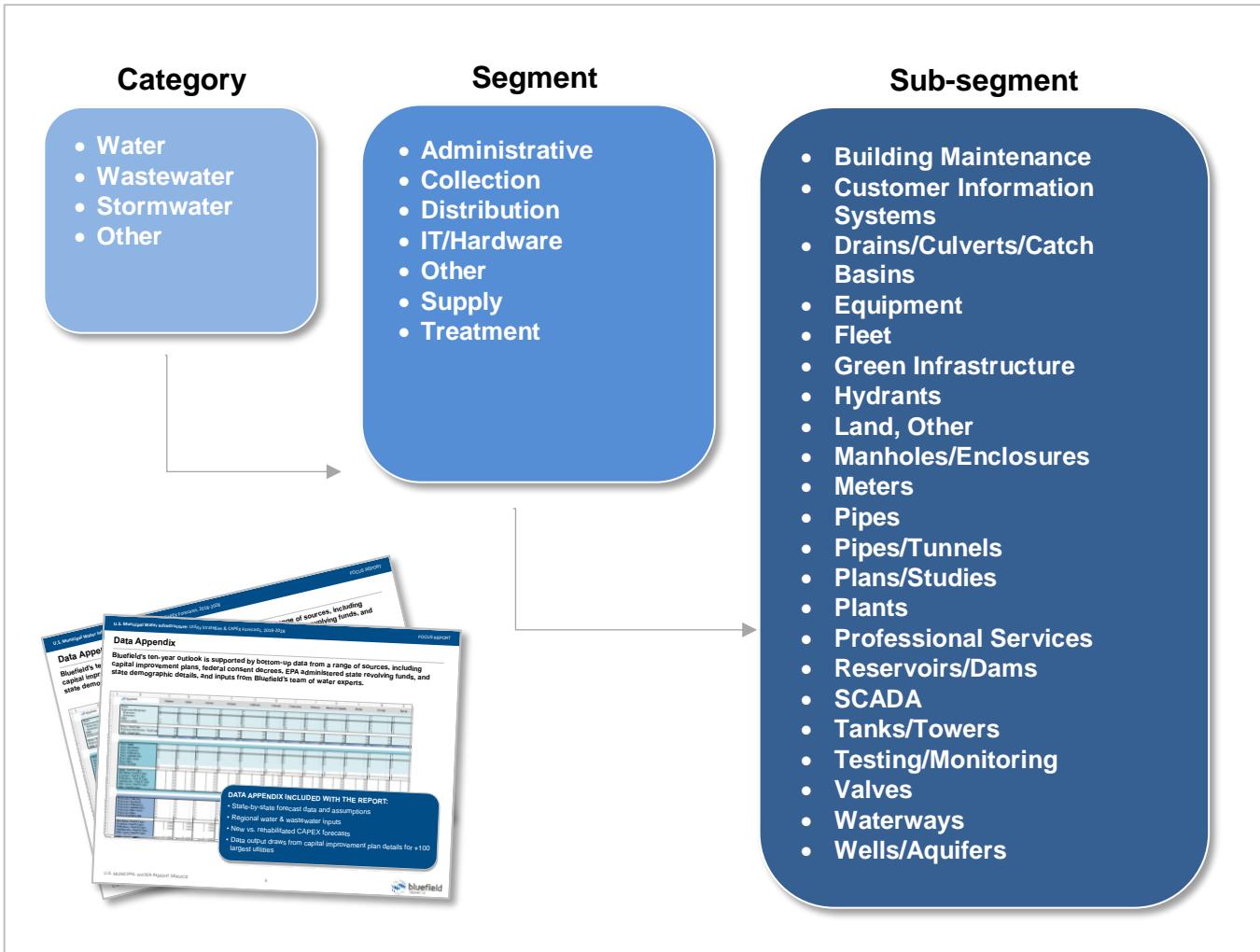
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DATA METRICS & APPENDIX

Bluefield's ten-year outlook is supported by bottom-up data from a range of sources, including capital improvement plans, federal consent decrees, EPA administered state revolving funds, and state demographic details, and inputs from Bluefield's team of water experts. Included in the report are forecast breakouts of key market categories, segments and sub-segments that make up the core of utility capital expenditures and Bluefield Research's ten-year forecast.

Bluefield's Breakdown of the Ten-Year Forecast



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