

# The Digital Water Revolution: Global Digital Water Market Forecast, 2022-2030

## About this Insight Report

The digital water revolution is here. The global water sector is being transformed by a wave of new technologies for connectivity, mobility, automation, and data analytics. In every region of the world, proactive utilities are increasingly turning to digital solutions to better serve their customers and stakeholders, maximize their operational performance and efficiency, and safeguard their assets and natural resources.

In parallel, an influx of industry incumbents and new market entrants are positioning to seize on this growing global demand with solutions ranging from established platforms like SCADA and GIS to cutting-edge applications of artificial intelligence (AI), Internet of Things (IoT), and big data analytics. The highly fragmented nature of the global water utility sector produces a complex landscape of opportunities for digital water technology and service providers, with utility needs and budgets varying widely based on size, location, income level, and digital maturity level.

This Insight Report provides a comprehensive analysis of the global market for digital water hardware, software, services, and connectivity. Bluefield evaluates key market trends, drivers, and inhibitors shaping the global outlook for digital water solutions and breaks down the forecast by technology, geography, and utility size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, Bluefield's forecast offers a highly nuanced view of the current state and future trajectory of digital adoption in the global water, wastewater, and stormwater sector.

## Forecasting Digital Water Growth across 45 Leading Global Markets



## report SCOPE

This Insight Report evaluates the market outlook for digital water solutions, globally, and highlights **key market hotspots, drivers for growth, and emerging opportunities.**

## report HIGHLIGHTS

- Drivers, trends shaping global digital water market growth
- Market structure, dynamics in key regional hotspots
- Transparent research methodology
- 10-year forecasts with in-depth breakdowns, including:
  - 34 technology segments
  - 45 leading global markets
  - Hardware, software, services
  - CAPEX & OPEX
  - Utility size / tier

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Exhibit: Bluefield Digital Water Market Taxonomy

Product Category	Technology Segments
<b>Metering &amp; Customer Management</b>	<ul style="list-style-type: none"> <li>Mechanical Meters</li> <li>Static Meters</li> <li>Automatic Meter Reading (AMR)</li> <li>Advanced Metering Infrastructure (AMI)</li> <li>Meter Data Management (MDM)</li> <li>Utility Billing / Customer Information System (CIS)</li> <li>Customer Engagement</li> </ul>
<b>Work &amp; Asset Management</b>	<ul style="list-style-type: none"> <li>Computerized Maintenance Management System (CMMS)</li> <li>Enterprise Asset Management (EAM)</li> <li>Geographic Information System (GIS)</li> <li>Network Modeling</li> <li>Plant Design</li> <li>Pipeline Condition Assessment Service</li> <li>CCTV Inspection</li> <li>Plant Asset Monitoring</li> <li>Pump Asset Monitoring</li> <li>Asset Failure Analysis</li> <li>Asset Investment Planning (AIP)</li> </ul>
<b>Network &amp; Plant Management</b>	<ul style="list-style-type: none"> <li>Plant SCADA</li> <li>Remote SCADA</li> <li>Plant RTUs</li> <li>Remote RTUs</li> <li>Dataloggers</li> <li>Fixed Leak Detection</li> <li>Leak Detection Service</li> <li>Flow Monitors</li> <li>Quality Monitors</li> <li>Level Monitors</li> <li>Pressure Monitors</li> <li>Network Operations Management / Decision Support</li> <li>Network Optimization</li> <li>Plant Optimization</li> </ul>
<b>Information Management</b>	<ul style="list-style-type: none"> <li>Data Management &amp; Integration</li> <li>Compliance Management</li> </ul>

Source: Bluefield Research

## Sample Insights

- Bluefield projects that total global digital water spend will scale at an 8.8% CAGR from US\$25.9 billion in 2021 to US\$55.2 billion in 2030. The 45 leading markets covered in this Insight Report account for nearly 90.0% of the 10-year, US\$387.5 billion market opportunity.
- With 24.6% of total global digital water spend, the U.S. is the epicenter of the digital water revolution, followed by major regional powers in Asia-Pacific (China, Japan) and Europe (Germany, France, U.K.).
- Core, legacy digital water segments (e.g., SCADA, mechanical meters, billing software) account for over 75.0% of total global spend, driven by adoption among small and mid-sized utilities in advanced markets and large mega-city providers in emerging markets.
- Double-digit growth is expected for emerging IoT and analytics solutions in areas like operational optimization, data integration, and strategic asset management, with adoption driven primarily by large, digitally mature utilities in upper-income markets.

Bluefield breaks down the outlook for **34 established and emerging digital water technology segments** across **four major categories**.

Who should buy this report?

- Digital water technology & service providers
- Private Equity companies, Venture Capital investors, and financial firms
- Water and wastewater utilities

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## Key questions addressed in this report

What is the 10-year outlook for the global digital water market?

What factors are driving digital water market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do digital water market opportunities vary by utility size?

How does digital spend break out across hardware, software, and services?

How will emerging technological, regulatory, financial, and environmental shifts impact the outlook for digital water?

Bluefield's reports contain tons of useful, detailed data and qualitative inputs into key trends. We rely on their insights for our business planning.

--Market Research Analyst  
Leading Engineering Company



We find real value in Bluefield's responsiveness and transparency in answering questions about the supporting data and research methodology used in their water market insights.

--Research Specialist  
Black & Veatch



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“Opportunities abound in the fast-growing global digital water market, though they vary significantly by region in response to differing local utility drivers and pain points, market structures, and digital maturity levels.”

Eric Bindler  
Research Director

## Markets Covered

### Americas

- Brazil
- Canada
- Chile
- Colombia
- Mexico
- United States

### Europe

- Austria
- Belgium
- Czech Republic
- Denmark
- Finland
- France
- Germany
- Ireland
- Italy
- Luxembourg
- Netherlands
- Norway
- Poland
- Portugal
- Spain
- Sweden
- Switzerland
- United Kingdom

### Asia-Pacific

- Australia
- China
- Hong Kong
- India
- Indonesia
- Japan
- Malaysia
- New Zealand
- Philippines
- Singapore
- South Korea
- Vietnam

### Middle East & Africa

- Bahrain
- Israel
- Kuwait
- Oman
- Qatar
- Saudi Arabia
- South Africa
- Turkey
- United Arab Emirates

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Data is a key component to this analysis. Our team has compiled relevant data dashboards available as an add on purchase option. Dashboards are accessible in Bluefield's Data Navigator platform.

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### about

#### BLUEFIELD RESEARCH

Companies across the value chain are developing strategies to capitalize on opportunities in water but are often challenged by a lack of high-quality, reliable intelligence. Bluefield bridges this gap with actionable, data-backed analysis that is supported by a transparent research methodology and ongoing access to our global team of water experts.

As an independent insight firm focused exclusively on water & wastewater in the municipal and industrial sectors, executives rely on our suite of insight services to validate assumptions, address critical questions, and strengthen strategic planning processes.

Bluefield works with key decision makers at utilities, project development companies, industrial companies, engineering firms, technology vendors, manufacturers, and investment companies, giving them tools to execute growth strategies.

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