

# Europe Municipal Wastewater Reuse: Business Models and Competitive Strategies



## About this Insight Report

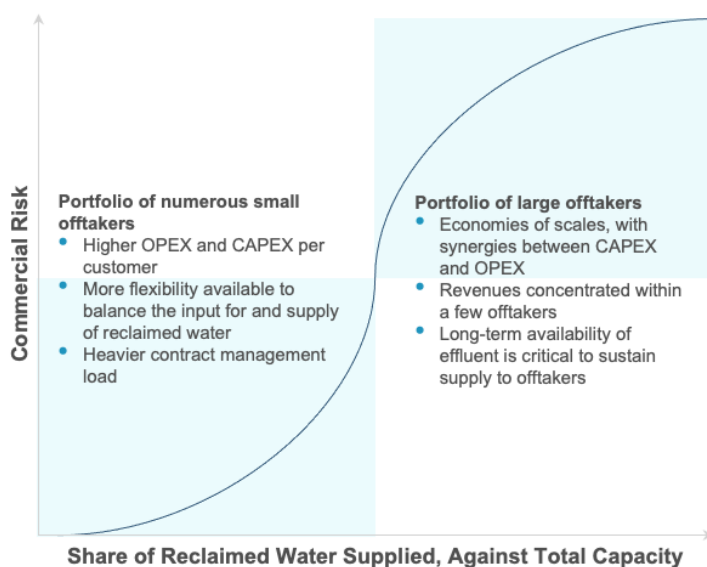
Water scarcity, one of the biggest challenges faced by governments and companies globally, has increased the urgency around the implementation of non-conventional water supply solutions. Driven by population growth, climate change, and increasing water demand, municipalities and players active in the water sector are reviewing opportunities for water supply options, particularly through reuse practices, to meet present and future demand. In Europe, the need for sustainable water management solutions has been magnified by drought, record-breaking temperatures, and recently adopted Wastewater Reuse Regulation. As a result, municipal wastewater reuse has gained significant attention across the continent.

Reuse schemes in Europe primarily consist in retrofitting existing WWTPs with additional advanced treatments and setting up the transport and storage infrastructure to supply off-takers. Business opportunities lie within countries with larger assets and higher water stress, where the value of reuse projects and the possibilities of engaging more off-takers—growing the client-base—balance out the associated risks and infrastructural challenges of reuse schemes.

Bluefield has analyzed 16 municipal wastewater reuse projects in nine European countries that showcase different approaches to customer-base targeting, infrastructure build-out, and investment structure. This Insight Report offers a review of Europe's municipal reuse landscape by exploring market opportunities through the analysis of business and value creation models, key case studies, the competitive framework, and selected players.

## Commercial Risk – Relation with Profiles of Off-Takers

Balancing Customer Base and Risk



Source: Bluefield Research

## report SCOPE

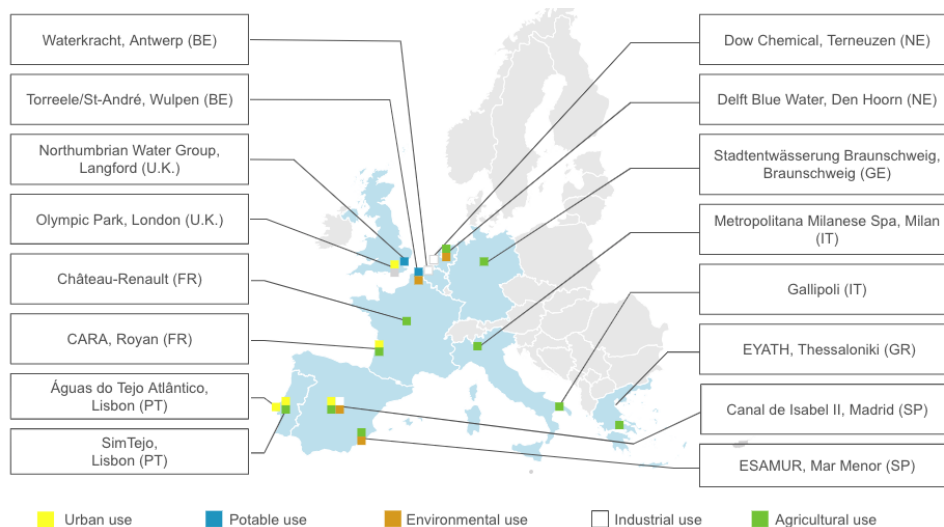
Backed by a transparent research methodology, this Insight Report provides **qualitative market analysis** to help companies understand **commercial strategies** for municipal wastewater reuse and navigate the current landscape of associated players in Europe.

## report HIGHLIGHTS

- **Commercialization Strategies Shaping Reuse Business Models**
  - Factors
  - Tariffs
  - Revenue generation
  - Assessment opportunities
- **Case Studies Analyzing Reuse Schemes**
  - Investment
  - Infrastructure
  - Customer base
  - Objectives
- **Competitive Landscape Review of Players**
  - Integrated players
  - Engineering consultancies
  - Utilities
  - Treatment technology providers
  - Conveyance equipment providers
- **30 Company Profiles**

## Municipal Reuse Schemes Concentrate in Coastal and Industrial Areas

Exhibit: Selected Wastewater Reuse Case Studies



Source: Bluefield Research

Comprehensive overview of municipal wastewater reuse practices in Europe, exploring the business models, commercial strategies, and development of key case studies.

### Who should buy this report?

- Engineering firms
- Treatment technology suppliers
- Effluent quality monitoring players
- Pipe suppliers
- Water infrastructure investors
- Public and private wastewater treatment operators

## Sample Insights

- The acceptance of publicly owned reuse schemes is powered by the lower cost of reclaimed water compared to regular sources of water.
- Risk mitigation focuses on managing the quality and volume of reclaimed water, balancing demand and supply capacities.
- Contractual long-term engagements contribute to framing the relationship between the off-taker and the reclaimed water supplier.
- Different factors drive reuse projects: policy framework, technical feasibility, economics, demand profiles, local water context.
- Enabling reuse is a political and geographic challenge. There is no “one size fits all” solution.
- Diverse companies dominate Europe's wastewater reuse market with their wide-ranging services, multi-country presence, and strong integration capabilities.
- Treatment technologies and conveyance equipment providers will attract the majority of capital expenditure dedicated to wastewater reuse.

## Key Questions Addressed in This Report

- What is the value proposition of municipal reuse schemes?
- Which key factors influence and shape the nature of the business model adopted?
- Where are the next municipal reuse hotspots?
- What determines the success of municipal reuse schemes?
- Why would off-takers invest in using recycled water?
- What does the value chain positioning look like for water reuse in Europe?
- Who takes part in municipal reuse projects in Europe?

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

“

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

“

# Europe Municipal Wastewater Reuse: **Business Models and Competitive Strategies**

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Summary: Background and Takeaways

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  - Project Development
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- Belgium: Waterkracht, Antwerp; Torreele/St-André, Wulpen
- Portugal: Aguas do Tejo Atlantico, Lisbon; SimTejo, Lisbon
- Italy: Metropolitana Minalene, Milan; Galipolli
- Greece: EYATH, Thessaloniki
- UK: Olympic Park, London; Northumbrian Water Group, Langford
- Netherlands: Dow Chemical, Terneuzen; Delft Blue Water, Den Hoorn
- Germany: Braunschweig

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- The Netherlands Reuse Scheme Details, Dow Chemical Terneuzen Facility
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- Germany Reuse Scheme Details, Braunschweig
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- Germany, Braunschweig Value Chain

Company Profiles

Integrated Players:

- Acciona
- Aqualia (FCC)
- Cadagua (Ferrovia)
- Evides Industriewater
- Tedagua
- Saur
- SUEZ
- Veolia

Other Integrated Players:

- Agbar
- Global Omnyum
- Sacyr Aqua

Engineering Consultancies:

- AECOM
- Black and Veatch
- Sweco

Other Engineering Consultancies:

- Bioazul
- Dragados (ACS)
- Ecofilae
- Mott MacDonald
- Royal HaskoningDHV

Utilities:

- Aguas de Tejo Atlántico
- Aquafin
- Canal de Isabel II
- Esamur
- MM SpA
- Northumbrian Water Group

Other Utilities:

- Balten
- Thames Water

Treatment Technology Providers:

- Bio-UV Group
- Ekopak
- Evoqua
- NX Filtration
- Solvay
- Trojan Technologies
- Xylem

Other Technology Providers:

- Aquaporin
- Cembrane
- DuPont
- Kemira
- Huber Technology
- SALHER

Conveyance Equipment Providers:

- Aliaxis
- APRO Industrie
- GF Piping
- Molecor
- Premier Tech
- Saint-Gobain PAM

Other Conveyance Equipment Providers:

- Amiblu
- Balmoral Tanks
- Enduramaxx

Bluefield profiled 30 companies at the forefront of the European municipal reuse water market taking part in the highlighted wastewater reuse case studies. In addition, other players active in the municipal wastewater reuse market in Europe are featured.

Veolia



Overview

Veolia is a major international environmental services company with businesses worldwide in water, waste, and energy management. Veolia's water business accounts for 42.2% of its global revenue, with activities across the value chain. The group is a key player in developing municipal wastewater reuse across Europe, particularly for industrial and agricultural applications. Through the Veolia Water Technologies business unit and its subsidiaries, it offers technology and personalized engineering services to develop complete water treatment solutions. The company manages 3,506 WWTPs serving over 97 million people worldwide.

**Reuse activity:** In France, Veolia operates a few WWTPs performing reclamation, and it plans to install reclamation technology in an additional 100 WWTPs. It also manages the first energy-positive WWTP in France (Cagnes-sur-Mer) and is currently implementing the first indirect potable reuse project—the Jourdain project in Vendée. In Milan, it provided Nosedo WWTP with digital technology to improve the reclamation plant's performance. In Tarragona (Spain), it sends reused water to the cooling systems for local industries.

Reuse Product Portfolio

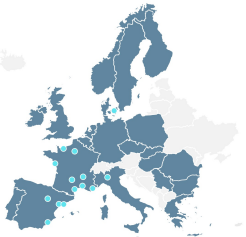
Elements	Details
Design and build/retrofit	<ul style="list-style-type: none"><li>• Design, construction, and deployment of water infrastructure</li><li>• Global water audits, process optimization, and support</li><li>• Digital solutions</li></ul>
Operations and maintenance	<ul style="list-style-type: none"><li>• Collection, treatment, and recovery of wastewater</li><li>• O&amp;M through concession contracts</li><li>• Customer management</li></ul>
Treatment technology equipment	<ul style="list-style-type: none"><li>• Decantation, clarification and flotation processes</li><li>• Filtration, UF and NF, RO, electro-separation</li><li>• UV, oxidation, chlorination, aerobic biological treatment, ozonation, ZLD</li><li>• Chemical formulations</li></ul>
Monitoring	<ul style="list-style-type: none"><li>• Testing, treatment, and control</li></ul>

Source: Veolia, Bluefield Research

Key Metrics (2022)

Elements	Details
Headquarters	Aubervilliers, France
Annual revenue	Global: €42.89 billion (US\$45.46 billion) Water: €18.26 billion (US\$19.36 billion)
Employees	220,000 (worldwide)
Ownership	Publicly listed

Operating Presence & Selected Reuse References



Each country profile includes:

- Key Metrics
- Reuse Product Portfolio
- Operating Presence & Selected Reuse References

## Purchase Options

# Europe Municipal Wastewater Reuse Analysis



Our Europe Municipal Wastewater Reuse analysis spans across two reports and includes an add on purchase option for data access to Bluefield's proprietary wastewater reuse data in [Data Navigator](#).



Part 1 Report  
Market Trends and Forecasts,  
2023–2030



Part 1 Data Dashboard  
Market Trends and Forecasts, 2023–  
2030



Part 2 Report  
Business Models and  
Competitive Strategies

## Market Trends and Forecasts, 2023–2030

\$3,500 USD Report (Immediate PDF download upon purchase)

\$5,000 USD Report + Data (Online access to data dashboard  
in Data Navigator)

[See Report Details](#)

## Business Models and Competitive Strategies

\$2,500 USD Report (Immediate PDF download upon purchase)

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## Bundle and Save: \$1,500 Savings

\$6,000 USD Two Reports + Complimentary Data Dashboard Access (\$1,500 value)

Get the full package of Europe Reuse analysis

[I Want to Bundle and Save](#)

### What is Data Navigator?

Data Navigator is Bluefield's customizable data platform, providing access to actionable water market data.

Data underpins Bluefield's breadth of insight reports and analysis. Through our interactive and flexible data platform, report buyers receive direct access to this wastewater reuse project and forecast data.

Not sure which option is best for you? We can help.

**Book a demo** of Bluefield's Data Navigator.

[Book Demo](#)



## 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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