

Europe Municipal Water & Wastewater CAPEX: Market Trends, Drivers and Forecasts, 2024-2030



About this Insight Report

Driven by aging water and wastewater infrastructure resulting in major operational challenges, European countries are investing in the renewal and maintenance of key systems such as pumping stations, storage, and treatment plants with a focus on decreasing non-revenue water and increasing treatment and distribution efficiency. Climate change concerns have also played a major role in boosting the region's investments in stormwater management and wastewater treatment, with a priority to reduce energy consumption by integrating smart water technology, sensors, and data analytics for better monitoring and control.

To overcome the shared challenges of water infrastructure development, concerned European countries have adopted an integrated solution approach, engaging in cross-border collaboration focusing on joint research, data sharing, and coordinated infrastructure development. Public-Private Partnerships (PPPs) have been explored as a financing model, attracting private investment and expertise, while sharing risks and responsibilities. As well, the region has adopted hybrid funding for water infrastructure projects sourced from national budgets, European Cohesion funds, and in some cases, private investments, impacting the scale and rate of infrastructure improvements.

Bluefield's Insight Report provides a comprehensive overview of water investment drivers in Europe, exploring the current state of the market, technological advancements, regulatory frameworks, funding structure and cost recovery strategies. By analyzing the national strategies and defined targets from various European countries, this forecast will highlight market opportunities by geography and by asset segment.

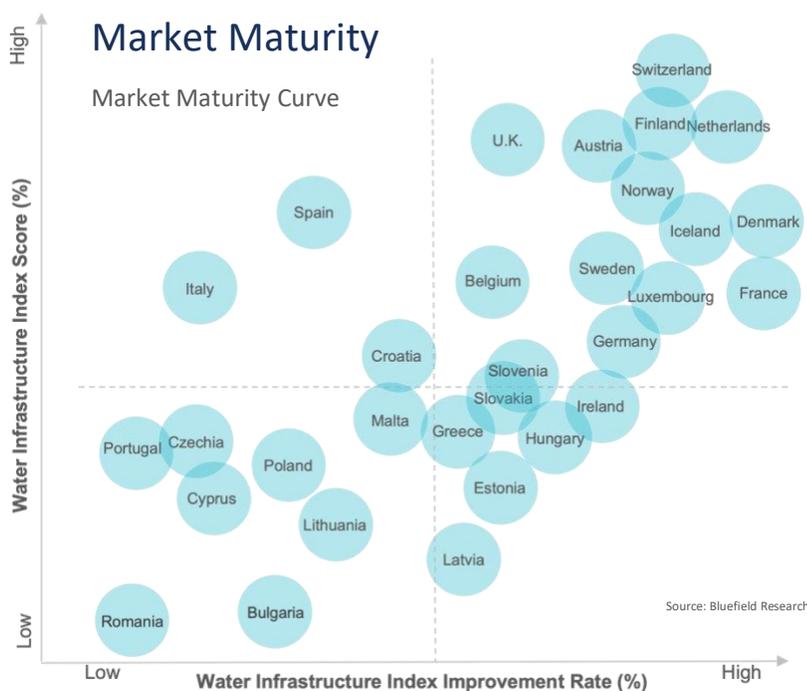
report SCOPE

Backed by a transparent research methodology, this Insight Report provides **qualitative** and **quantitative analysis** to help companies understand the **market opportunity** in Europe for over the next seven years.

report HIGHLIGHTS

- Europe water market trends and drivers: analyzing factors shaping the market structure
- Methodology breakdown by segment and by country
- Market sizing and forecasts for the period 2024–2030 for water and wastewater assets in 31 European countries:

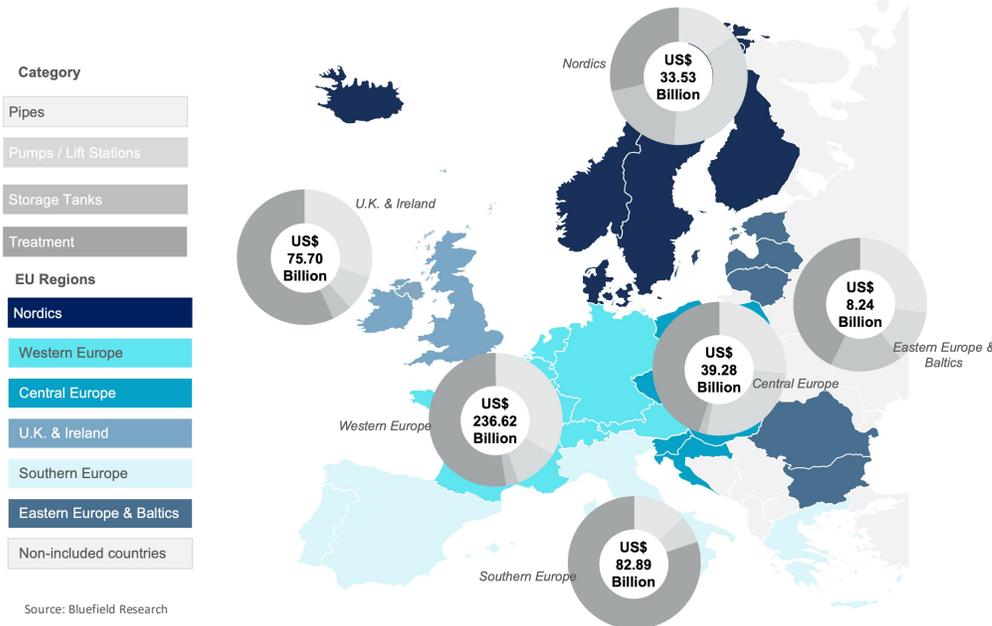
- Treatment plants
- Pump and lift stations
- Storage tanks
- Pipes networks



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Geography Dictates Opportunity

7-Year Asset Water and Wastewater Spend by Region and Market Category, 2024–2030



Comprehensive overview of municipal market for water and wastewater assets in 31 European countries.

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

- Western Europe concentrates the largest investment share with a cumulative CAPEX of approximately US\$236 billion with 7-year spend growing at a CAGR of 2%, scaling up from US\$30 billion.
- The Nordic region, Western Europe, and the U.K. focus their investments primarily on water digitalization and the transition to green technologies.
- In Southern and Eastern Europe, the emphasis is on addressing infrastructure and drought challenges, while improving wastewater treatment efficiency.

More Insights

- The Nordics aim to enhance the resilience of primary water infrastructure through strategic interventions on large drinking water aqueducts, with a projected CAPEX investment of approximately US\$33.5 billion.
- The U.K. and Ireland collectively represent the third-largest share of Europe's water and wastewater infrastructure forecasted spend.

Key Questions Addressed in This Report

What key factors are influencing and shaping Europe's water market?

How are European countries addressing the financial challenges in the water sector?

What is the funding structure and the cost recovery policy in the EU?

Where are the investment hotspots in the European water market?

What does the value chain positioning look like for municipal water in Europe?

What will Europe's water and wastewater asset investment market look like over the next seven years?

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

“

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-- Patrick Keane
Worldwide Head of Development
AWS Water



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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