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About this Report

U.S. Municipal Water Reuse: Market Trends and Forecasts, 2025–2035

Released October 2025

Sections

- U.S. Water Reuse Market Drivers and Trends
- Regulatory Landscape and Project Financing
- Reuse Technology Landscape
- Industrial Applications for Reclaimed Water
- Planned Reuse Projects
- Forecast Breakdown
- Regional Analysis
- Related Data Dashboards

Summary

BACKGROUND

Water reuse is increasingly being recognized as a cornerstone of resilient water supply planning in the U.S. Once regarded as a niche solution for drought-prone western states, it has evolved into a mainstream, cost-competitive option for augmenting stressed freshwater supplies. Declining treatment costs, improved regulatory frameworks, and greater public acceptance are making water reuse more attractive than developing new surface or groundwater resources.

The urgency to secure future supplies—exacerbated by groundwater depletion, saltwater intrusion, and persistent drought—has accelerated the momentum toward broader adoption of reuse, particularly for potable offtake applications. With the U.S. municipal reuse sector forecasted to drive over US$47.1 billion in capital investment from 2025 to 2035, treated wastewater is steadily emerging as an attractive alternative source of water. This approach provides a means to diversify water portfolios for urban, agricultural, and industrial users.

Bolstered by increased funding, stronger public support, and heightened legislative activity, the U.S. municipal reuse market is poised for long-term growth. However, challenges such as a fragmented policy landscape, complex permitting processes, and high up-front capital costs continue to constrain scalability.

Three states anchor U.S market growth: California, Colorado, and Texas are expected to account for 72% of the forecasted capacity additions

report SCOPE

This 2025–2035 forecast assesses the growth potential of municipal reuse by utilizing a historical dataset of more than 1,000 projects across 22 states, outlining state-level activity and capital investment over the next decade.

report HIGHLIGHTS

- Drivers and opportunities shaping municipal reuse investment and spending decisions
- Recent policy developments and funding opportunities bolstering project adoption
- Federal and state funding opportunities for project financing
- Offtake applications with highest planned capital investment
- Market sizing and forecasts for the period 2025–2035

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Research Methodology and Data Sources

Scope

This Insight Report assesses key drivers, trends, and developments shaping the U.S. municipal reuse market, cumulating into an outlook of the growth potential of U.S. municipal reuse activity from 2025 through 2035. This analysis is backed by a historical dataset of more than 1,000 planned and completed projects across 22 states, outlining state-level activity and capital investment over the next decade.

Key Assumptions And Methodology

Macro-level Inputs:

- Capacities and flows for wastewater reuse were calculated using a combination of measured flows from individual plants and topline data from federal, state, and regional water planning agencies.
- The applications of reclaimed water are categorized into irrigation, industrial use, and potable water based on historical trends, announced projects, and policy shifts that reflect changing priorities in wastewater reuse and reclaimed water applications. Projects classified as ”Other” include miscellaneous non-potable end uses such as street cleaning, toilet flushing, firefighting, and energy production. There were varying degrees of reported data dependent on state disclosures.

Assumptions:

- CAPEX was estimated using average costs for planned wastewater reuse plants.
- The costs of potable reuse projects were calculated by averaging the costs of DPR and IPR projects, yielding total CAPEX costs of ~US$15.211 million per MGD of capacity. Of this amount, 69% is allocated to treatment systems, 23% to pipes, and 8% to other capital costs. These costs are assumed to remain stable for this forecast.
- Irrigation projects are estimated to have total CAPEX costs of ~US$13.706 million per MGD of capacity. In comparison, industrial projects are estimated at ~US$7.110 million per MGD of capacity. For non-potable projects, it is assumed that 33% of CAPEX costs are for treatment systems, 63% for pipes, and 4% for other expenses. These costs are assumed to remain stable for this forecast.
- To estimate the year of commissioning for undisclosed projects, the average time from the current project phase to completion was calculated using Bluefield’s 412 tracked completed projects. Projects that are on hold or in the preconceptual phase were excluded. The following commissioning years are assumed for projects in each phase in 2025: Conceptual, 2031; Feasibility, 2029; Financing Approved, 2028; Tendered, 2028; Construction, 2027.
- To estimate the capacities of projects with undisclosed information, the average capacity addition of 5.96 MGD for both planned and completed projects in Bluefield’s database was leveraged.

Data Sources

- Press releases
- Utility capital improvement plans
- Texas’s Regional Water Plans
- California’s Urban Water Management Plans (UWMPs)
- Colorado Water Plan
- Clean Water State Revolving Fund (CWSRF) applications
- Other state & municipal regulatory filings
- Regional water districts and project lists
- Primary research conversations with company and utility representatives
- Federal, state, and regional water planning agencies
- U.S. Environmental Protection Agency

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Insights

SAMPLE TAKEAWAYS

US$47.1 billion market poised for expansion.

Bluefield Research forecasts that capital expenditures (CAPEX) for municipal water reuse capacity additions will exceed US$47.1 billion by 2035. This projection underscores the substantial investment required for utilities and municipalities to diversify their water supplies and enhance their resilience against climate-related challenges.

- **Potable reuse accelerates alongside irrigation demands.** While irrigation applications such as agriculture, landscaping, and municipal green spaces remain foundational accounting for nearly half (48%) of all new reuse volume expected through 2035—potable reuse (i.e., DPR and IPR) is rapidly gaining traction. By 2035, potable reuse projects are projected to account for 37% of all new reuse capacity, signaling a strategic pivot toward higher-value, supply-resilient applications.
- **Three states anchor U.S market.** California, Colorado, and Texas are expected to account for 72% of the forecasted capacity additions, with California alone responsible for 41% of this total. Reuse is becoming a key component of long-term water supply planning. In Texas, 15 of the state's 16 regional water plans officially recommend reuse as a core strategy for water management.

- **Reuse favorably positioned against other alternative supplies.** Due to its scalability and cost-effectiveness, reuse ranks competitively against seawater desalination and imported water. In California, indirect potable reuse (IPR) has been estimated to be 26% to 36% cheaper than seawater desalination, with IPR costs ranging from ~US$6,137 to ~US$7,673 per million gallons. The overall economic advantage of reuse is driving a pipeline of 622 planned projects across 19 states, with announced investments exceeding US$27 billion.
- **Momentum for policy development remains inconsistent.** The lack of a federal reuse mandate has led to a reliance on fragmented state-level frameworks. States such as California, Texas, Arizona, Colorado, and Florida have established some of the most advanced regulatory frameworks in the U.S. At least 12 other states have implemented, are currently advancing, or at least considering DPR policies, signaling a gradual but expanding acceptance of potable reuse at scale.

- **Funding streams ramp up.** An estimated US$7.70 billion in infrastructure needs for reuse conveyance has been identified by the U.S. Environmental Protection Agency, which is expected to attract new capital. Federal support includes US$1.26 billion allocated from the U.S. Bureau of Reclamation's WaterSMART program. Additionally, state-level initiatives, such as the Texas Water Fund, are emerging as strategic sources of supplemental financing to bridge gaps in local capital budgets.

Key Questions Addressed

Which reuse off-take applications are projected to witness the most growth from 2025–2035?

What are the primary funding sources for U.S. municipal water reuse, and where are they being allocated?

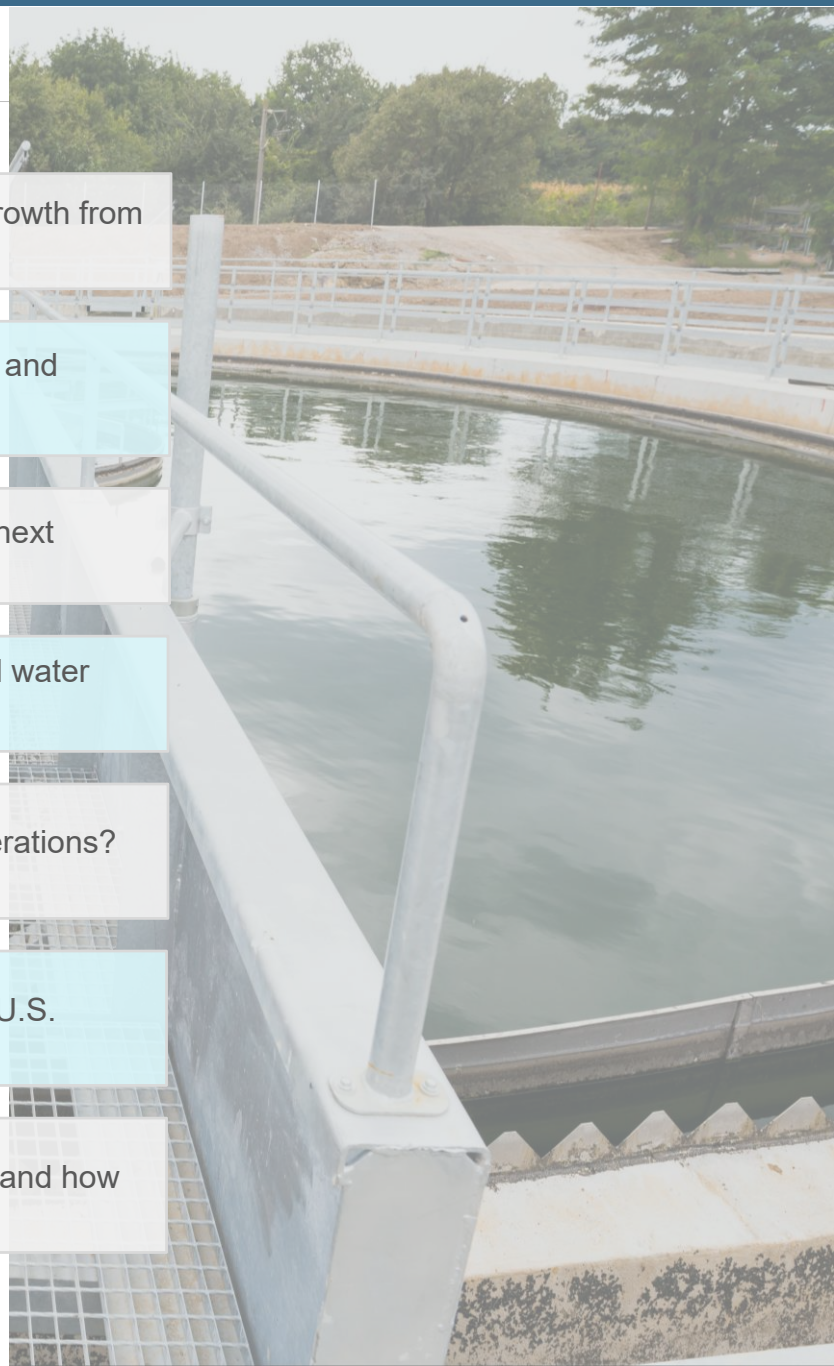
Which U.S. regions are experiencing the most reuse growth over the next decade?

What is the estimated spend on capital expenditure for U.S. municipal water reuse expansion from 2025–2030?

What industrial off-takers are sourcing treated municipal water for operations?

What are the key market drivers and considerations for growth in the U.S. municipal water reuse market?

What are the key policy developments in U.S. municipal water reuse, and how do regulatory frameworks differ by state?



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U.S. Municipal Reuse Market Drivers

Shifting population dynamics, funding availability, environmental factors, and state and regional policies all promote the development of water reuse projects.

Water Reuse Market Drivers

Demographic Shifts: Rapid population growth can overwhelm existing infrastructure and water resources, creating a demand for increased supply. This growth also leads to higher wastewater flows, which can be recycled, particularly in urban areas.

Environmental Events: Growing concerns about water-related issues—such as saltwater intrusion, nutrient pollution, excessive groundwater depletion in regions facing water stress, and increased frequency and intensity of extreme weather events (e.g., heavy precipitation and prolonged flooding)—are driving the search for alternative water supply sources.

Cost of Water: Consecutive water systems, which purchase some or all of their treated water from other wholesale systems, can face higher per capita operational costs for traditional water supply methods.

Economic Footprint: States and regions that host water-intensive industries—such as agriculture, livestock, and data centers—are increasingly seeking to create a diversified water portfolio. This strategy aims to mitigate water stress and enhance corporate sustainability efforts, particularly in areas experiencing rapid growth.

Financial Investment: Federal funding programs such as State Revolving Funds (SRFs), the Water Infrastructure Finance and Innovation Act (WIFIA), and WaterSMART can help finance the planning, design, and construction of water reuse projects.

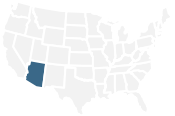
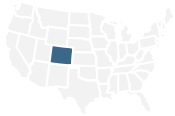
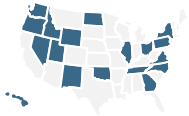
Policies and Guidance: Recent developments in water reuse policies, guidance, and incentives at various regulatory levels are fostering the implementation of reclaimed water initiatives. At the federal level, the U.S. Environmental Protection Agency (EPA) has launched the Water Reuse Action Plan. Regionally, water rights agreements in the Colorado River Basin necessitate interstate cooperation, while state-level policies guide acceptable end-uses of treated municipal wastewater.

Sustainability: On-site water reuse can help reduce excessive wastewater discharges contributing to surface water pollution and combined sewer overflows (CSOs). This practice has the potential to lower overall energy demands and reduce carbon emissions.

Utility-Level Characteristics: Reclaimed water projects can alleviate the pressure on WWTPs that are approaching their maximum design capacities. Additionally, combined sewer systems (CSSs) may adopt reuse processes to manage excessive volumes of influent better.

Source: U.S. Environmental Protection Agency, WateReuse Association, U.S. Bureau of Reclamation, Bluefield Research

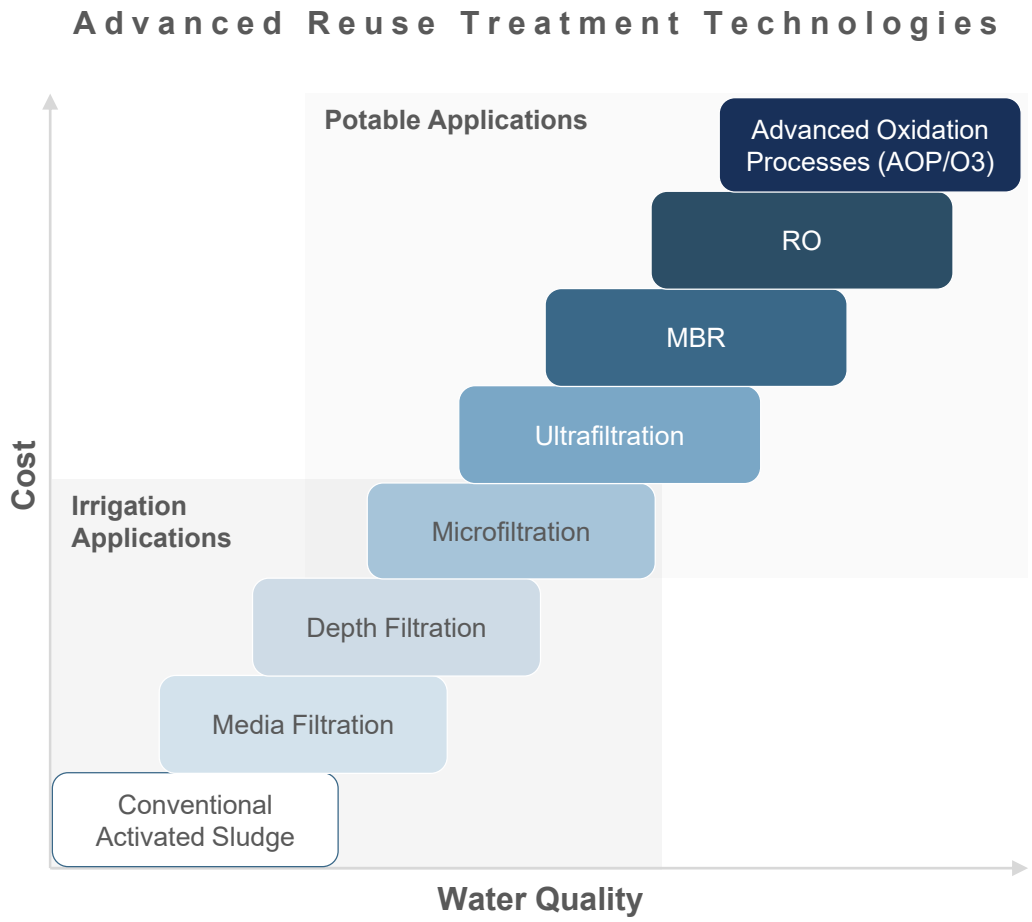
State-Level Market Drivers Shape Outlook

	Key Market Drivers	Greenfield Opportunities
 California	Drought conditions and the increasing importance of groundwater management and storage, along with a comprehensive policy framework for water recycling projects, are expected to drive infrastructure build-out for water reuse. There is a notable shift toward industrial and advanced potable applications for reclaimed water, as evidenced by the recent passage of DPR regulations in the state.	• IPR • DPR • Urban utilities
 Florida	Florida's mature state market for water reuse is experiencing growth driven by incremental capacity additions at existing treatment plants and the expansion of pipelines, which enable more users to access current reclaimed water supplies. The Ocean Outfall Legislation plays a crucial role in driving the expansion of reuse initiatives in Southern Florida.	• Saltwater intrusion mitigation • Ocean outfalls • IPR • DPR
 Arizona	Arizona is addressing the risks associated with relying on Colorado River water through focused efforts to bank excess flows (including the use of reclaimed water) in aquifers for future use. The state's industrial and real estate booms, combined with water scarcity and new DPR regulations, have made water reuse an increasingly appealing and resilient supply option.	• Water banking • Industrial applications • IPR • DPR
 Texas	A history of severe drought, combined with rising demand due to population and economic growth, has stimulated a proactive approach to long-term water-supply planning. Texas was the first state to implement a DPR facility, utilizing technologies such as RO, MF, and AOP/O3 in the city of Big Spring.	• IPR • DPR • Industrial applications
 Colorado	Public education about limited environmental resources is encouraging greater acceptance of alternative water supplies. However, Colorado's unique topography presents challenges for water transportation, with the Continental Divide separating 80% of the state's population from 80% of the state's water supply.	• Environmental restoration • DPR • IPR
 Other	States like Georgia, New Mexico, Oklahoma, Idaho, and Nevada are developing water reuse markets by building capacity, passing policies, and establishing regulations to support the permitting of reuse projects.	• Discrete municipal & industrial projects • Offset saltwater intrusion (Virginia, New York)

Source: Western States Water Council, WateReuse Association, Water Environment Research Foundation, Bluefield Research

Advanced Water Treatment Technology Adoption

With growing market maturity, advanced treatment technologies are becoming more financially feasible for reclaimed water projects. However, the initial capital investment needed to implement these technologies can still be dauntingly high for some cash-strapped utilities.



Analysis

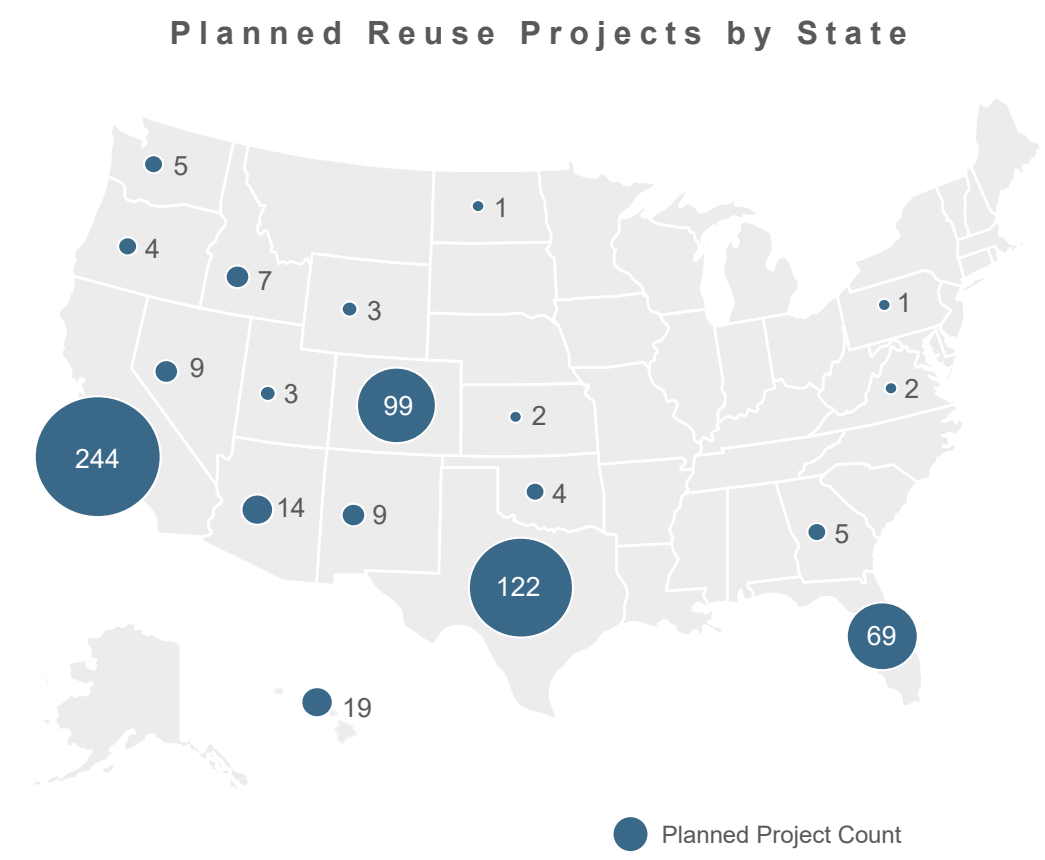
Sustainability incentives, concerns about emerging contaminants, and the need for resource efficiency are driving transformation in water reuse technology.

- The typical advanced treatment train for potable reuse involves microfiltration, RO, UV disinfection, and advanced oxidation. However, MBRs—essentially streamlined activated sludge systems—are gaining traction due to their lower chemical and disposal costs, as well as their ability to comply with increasingly stringent effluent regulations.
- Economic tailwinds and budget constraints often lead utilities to prioritize spending on essential needs, such as capital improvements, rather than investing in cutting-edge digital solutions. While utilities may be reluctant to adopt treatment technologies with high up-front costs, the potential for long-term savings is particularly compelling in regions facing water scarcity.
- Several potable reuse technologies also address the removal of per- and polyfluoroalkyl substances (PFAS), including RO, advanced oxidation processes, and granular activated carbon. With new PFAS maximum contaminant levels set in April 2024, utilities investing in PFAS mitigation are also laying the groundwork for potable reuse capabilities.
- Emerging technologies are helping to reduce the energy intensity of reuse treatment. Recent innovations in the field include high-rejection and graphene oxide membranes for RO, as well as advancements in ozone treatment and BAC.

Source: General Electric, U.S. Environmental Protection Agency, Seven Seas Water Group, International Desalination and Reuse Network, Bluefield Research

Geographic Distribution of Planned Reuse Projects

Florida and California are the largest developed markets for water reuse in the U.S. California leads all states with 244 planned projects, followed by Texas with 122 and Colorado with 99.



Analysis

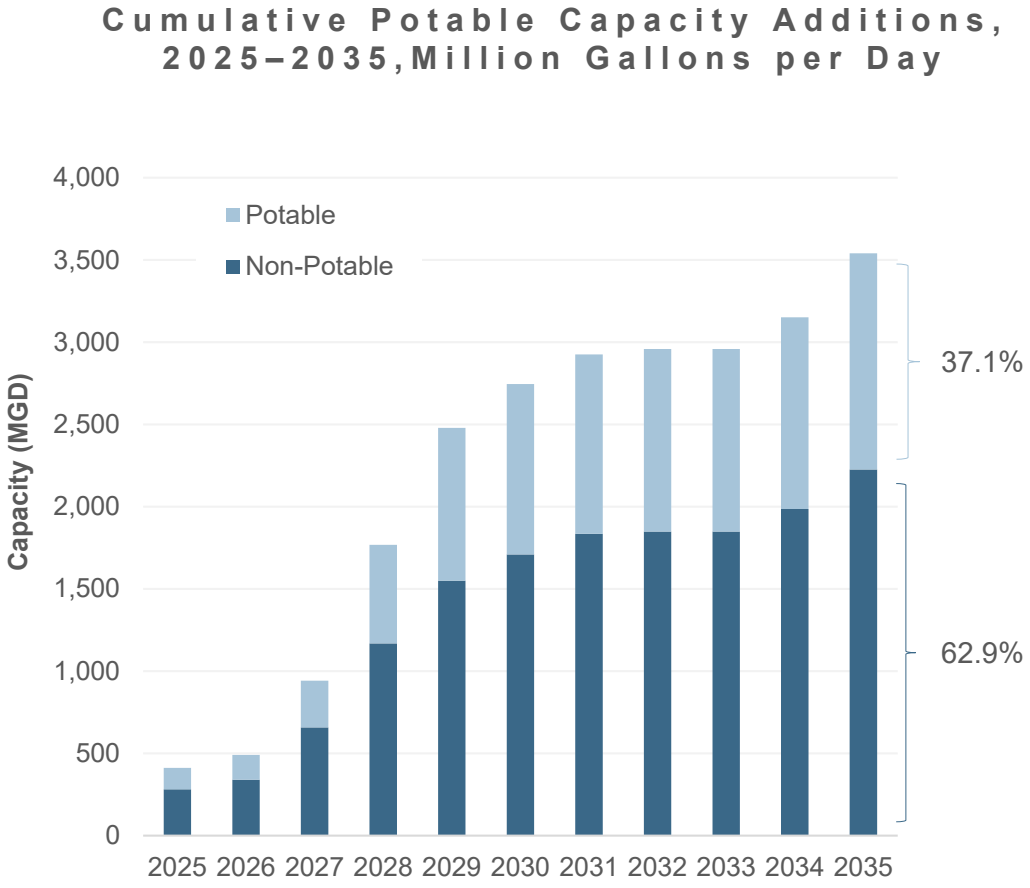
Although California accounts for over a third of the water reuse projects in the pipeline, traditional water reuse markets are not necessarily the fastest growing.

- Bluefield has recorded the completion of 412 reuse projects, with 87% located in California or Florida. Florida is the largest market for completed projects, with a total of 181, and it ranks fourth for planned projects with 69.
- Together, California, Texas, Colorado, and Florida make up nearly 85.9% of the planned projects. This marks a 4.1% decline from 2017, highlighting a growing interest in water reuse across other states in recent years.
- Since 2019, six new states—Georgia, Hawaii, New Mexico, North Dakota, Pennsylvania, and Tennessee—have completed reuse projects. Hawaii holds the fifth-largest share of pending reuse projects.
- Newly implemented DPR policy frameworks in Colorado (January 2023), California (October 2024), and Arizona (March 2025) are expected to boost potable reuse market activity. However, the lengthy initiation, planning, and implementation phases required for adopting reuse projects can extend the timeline for new developments over multiple years.

Source: Bluefield Research

Potable vs. Non-Potable Reuse Capacity Forecasts

Potable reuse is projected to account for over 37% of all municipal reuse capacity additions from 2025 to 2035, resulting in a total of over 1,313 MGD in added reuse volume.



Analysis

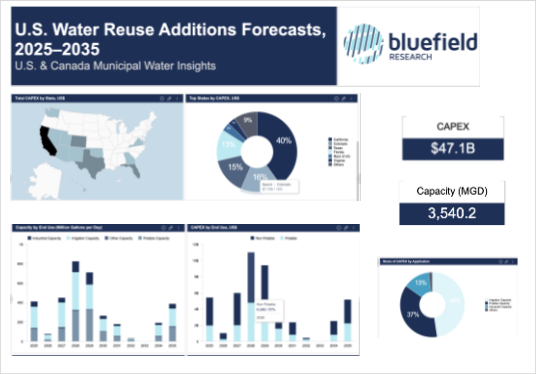
Non-potable applications remain the primary use for municipal reuse, but potable applications are gradually gaining traction across the U.S.

- Potable reuse projects, including both direct and indirect methods, are projected to account for 1,313.7 MGD of the total 3,540 MGD in capacity additions projected from 2025 to 2035.
- From 2011 to 2022, 56% of 18 western states analyzed by the Western States Water Council made progress in implementing direct and indirect potable reuse. Interest in these initiatives is expected to continue growing steadily over the next decade. However, challenges such as water rights issues, stringent water quality standards that create complex approvals across multiple jurisdictions, and public perceptions of "recycled wastewater" remain barriers to progress.
- As potable reuse gains acceptance in long-term water management, projects are evolving from smaller, isolated efforts to larger-scale facilities. This trend is particularly evident in developed markets, such as California (e.g., Los Angeles's DPR project), Texas (e.g., New Braunfels's IPR project), and Florida (e.g., Miami-Dade's North District WWTP project).
- In Virginia, the 100 MGD Hampton Roads Sanitation District SWIFT IPR project is currently under construction. Located in an area with a growing data center hub, this project is significant as it marks the first program in the U.S. to augment a reservoir with recycled water. Additionally, Northern Virginia offers a favorable policy environment that is particularly conducive to the development of water reuse projects.

Source: Western States Water Council, Virginia Water Resources Research Center, Bluefield Research

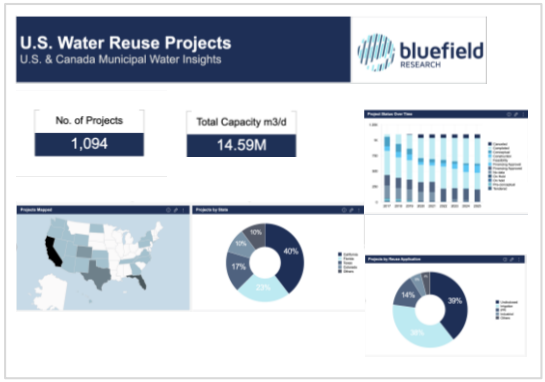
Data Navigator – Related Data Dashboards

Data underpins Bluefield's breadth of insight reports and analysis. This report is accompanied by data dashboards that are available in Bluefield's flexible and interactive Data Navigator platform.



Dashboard Widgets US$:

- Total CAPEX by State
- Top States by CAPEX
- Capacity by End Use (MGD)
- CAPEX by End Use
- Share of CAPEX by Application
- Share of CAPEX by Infrastructure and Services Category



Dashboard Widgets US$:

- Projects Mapped
- Projects by State
- Projects by Reuse Application
- Project Status Over Time
- Project by Year of Commissioning
- Share of CAPEX by Infrastructure and Services Category

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Global companies across the value chain are developing strategies to capitalize on greenfield opportunities in water − new build, new business models, and private investment. Bluefield Research supports a growing roster of companies across key technology segments and industry verticals addressing risks and opportunities in the new water landscape.

Companies are turning to Bluefield for in-depth, actionable intelligence into the water sector and the sector's impacts on key industries. The insights draw on primary research from the water, energy, power, mining, agriculture, financial sectors and their respective supply chains.

Bluefield works with key decision makers at utilities, project development companies, independent water and power providers, EPC companies, technology suppliers, manufacturers, and investment firms, giving them tools to define and execute strategies.

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