About this Report

Australia Digital Water Landscape: Utility Strategies, Competitor Dynamics, and Growth Forecasts, 2026–2036

Report at-a-glance

- Drivers and Trends
- Utility Landscape
- Forecast Breakdown
- Competitive Landscape
- Company Profiles
- Utility Profiles
- Data Dashboard

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Summary

BACKGROUND

As the world's driest inhabited continent, Australia has emerged as a frontrunner in implementing digital water solutions to safeguard its water resources. Bluefield Research projects that the Australian digital water landscape will reach a total value of US$17.4 billion by 2036, with significant growth expected over the next decade.

Growth in the Australian digital water landscape continues to be driven by water utilities' need to increase the resiliency of their water supplies against future droughts. Additionally, Australia is experiencing significant population growth, which is increasing demand on already-strained water supplies. Utilities are pursuing a variety of strategies to secure their future water supplies, and digital strategies are integral to meeting demand.

As Australian utilities continue to grow their spending, the vendor landscape is becoming more competitive. The landscape currently comprises a mix of large multinational vendors with regional offices and locally founded suppliers offering solutions tailored to the Australian market. As utilities move from pilot-scale to network-wide deployments, new entrants, especially in smart metering, are gaining traction and reshaping the competitive dynamics.

Growth in expenditures on digital solutions is driven by the urgent need to address water efficiency, with smart meter rollouts and leak detection underpinning significant growth.

report SCOPE

This report offers a comprehensive analysis of digital water opportunity in Australia, including hardware, software, services, and connectivity. Bluefield's bottom-up approach provides a detailed view of the current landscape, potential for future growth, and insights into major drivers and trends, the competitive environment, and detailed company profiles of 24 digital water incumbents and 8 major utilities.

report HIGHLIGHTS

- Policy, demographic, and climate drivers shaping the digital water landscape in Australia
- Market sizing and forecasts for 35 different product segments from 2026–2036
- Competitive landscape analysis, identifying key players and M&A and VC activity
- Company profiles highlighting strategy and Australian activity
- Utility profiles showcasing key utility metrics, capital investment priorities, and recent contracts

Bluefield Insights

Australia's digital water expenditures are set to more than double over the next decade as utilities invest in the technology they need for a resilient future.

Bluefield Research forecasts total expenditures on digital solutions to grow from US$958.6 million in 2026 to US$2.4 billion in 2036. This growth is driven by a 9.6% Compound Annual Growth Rate (CAGR) and underscores water utilities' shift toward enhancing water efficiency through digital solutions.

- **Large, urban utilities drive growth in the Australian digital market.** The Australian digital landscape is highly consolidated in urban, Tier 1 utilities that serve almost 70% of the total population in Australia. Tier 1 utilities have the highest level of digital maturity, while smaller utilities require more integrated vendor support to adopt digital strategies.
- **Foundational digital water solutions pave the way for advanced technologies.** Traditional digital water solutions, such as Supervisory Control and Data Acquisition (SCADA) and Geographic Information System (GIS), are a significant portion of the spend for utilities. Newer technologies, such as smart meters, offer a strong growth opportunity, with two full-scale rollouts at Tier 1 utilities and other pilots across the country. Utilities are driven to implement smart meters to increase water efficiency through leak detection and to enhance customer engagement through real-time monitoring.
- **The competitive landscape is heating up as utilities address water concerns.** The Australian market is a mix of large multi-national corporations and locally founded companies. New entrants, especially in smart metering, are increasing competition to support utilities' water efficiency efforts.
- **Engineering firms play a growing role in shaping utility strategy.** Water utilities are leveraging long-term partnerships with engineering firms for design and delivery of capital programs. As such, engineering firms have become deeply integrated into utilities, which play a growing role in design and procurement strategies.

Research Methodology

KEY ASSUMPTIONS & METHODOLOGY

- Bluefield Research utilizes a bottom-up approach to size the digital landscape, informed by utility asset bases and calibrated with adoption and growth rates across different sized utilities.
- Key asset inputs include pipe length, treatment plants, remote assets and connected properties across water and wastewater networks.
- Baseline penetration and adoption rates are determined for each utility size, as defined by Bluefield Research. Growth rates in each segment are informed through policy, utility announcements, and interviews with industry professionals.
- Market value calculations are based on average pricing for different solutions segments, including up-front costs, annual support, and SaaS fees.
- The digital water landscape is segmented across 35 different solution segments across four different solution categories, including Network and Plant Management, Metering and Customer Management, Work and Asset Management, and Information Management.
- The forecast is further segmented across states, water type, spend type, and product type.

DATA SOURCES

- Government reports on utility counts and asset bases.
- Publicly available utility budget and procurement documents, such as capital improvement plans, bid documents, and contracts.
- Interviews with industry professionals.
- Bluefield's Data Navigator (e.g., utility asset data, federal funding, company revenues, digital water M&A and VC deals, digital water vendor landscape).

Key Questions Addressed

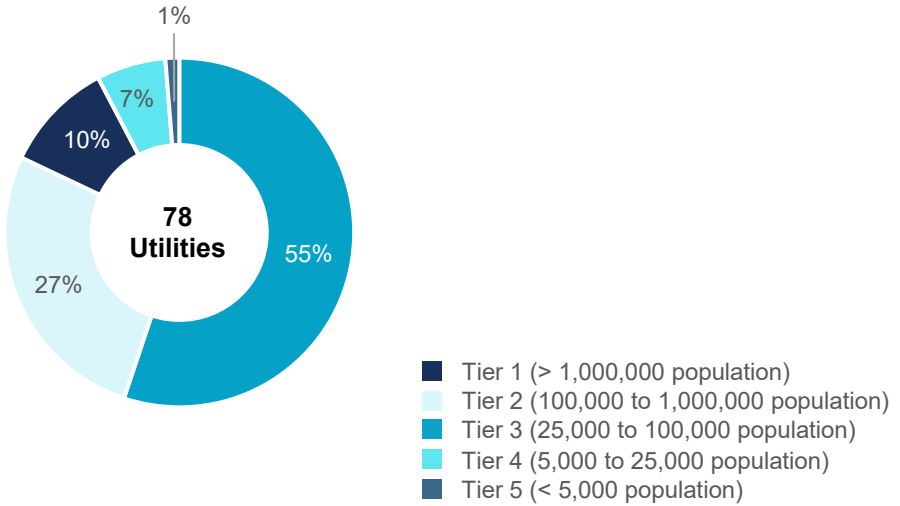
- How are Australian utilities enhancing their resiliency against drought with digital solutions?
- What is the total size of the Australian digital water market and how does it vary by geography?
- How are new desalination plants and recycled water networks influencing the digital landscape?
- How are utilities considering AI adoption?
- Which vendors have signed recent contracts and what utilities are they working with in Australia?
- What are key digital investments large utilities have made recently and what are upcoming priorities?

Utility Landscape Highlights Differing Priorities

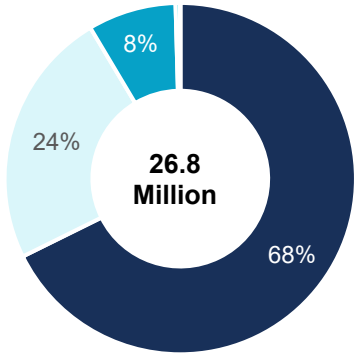
Australia's water utility landscape is highly concentrated in cities, with a small set of major utilities serving an outsized portion of the population. Larger utilities are driven by the need to meet demand from urban population growth, while smaller utilities seek solutions that improve network management across distributed assets.

- Australia’s population largely resides in urban areas, with 82% of the population being served by 16 larger, urban utilities.
- Five bulk water suppliers manage water resources and operate key infrastructure, including dams, weirs, and treatment plants, to then sell treated water to local utilities and industrial users.
- Larger utilities in urban areas have robust digital innovation teams to drive digital water adoption and innovation. These utilities are seeking solutions that can be integrated into the growing stack of in-house capabilities.
- Water consumption is projected to rise by 73% in urban areas over the next 30 years due to population growth and demographic shifts, underscoring the need for digital water solutions to support infrastructure expansion and operational efficiency.
- Small and medium utilities in rural areas have smaller headcounts and lack the dedicated staff for digital transformations. Digital solutions must be easy to adopt with “plug and play” functionality.
- Rural utilities maintain less-dense networks and seek solutions such as remote monitoring systems that will help to manage their distributed assets faster.

Distribution of Utilities by Population Served



Distribution of Population Served by Utility Tier



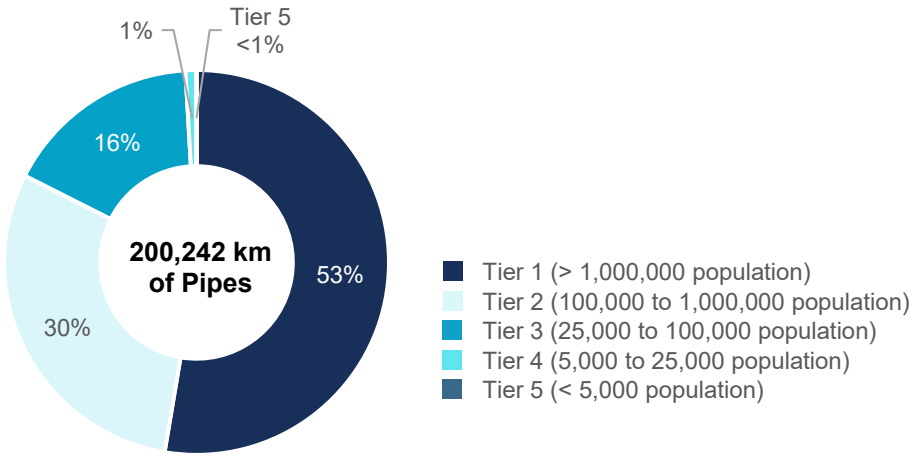
Source: Bureau of Meteorology Urban National Performance Report, Australian Water Association, Bluefield Research

Australia's Aging Water Pipe Infrastructure

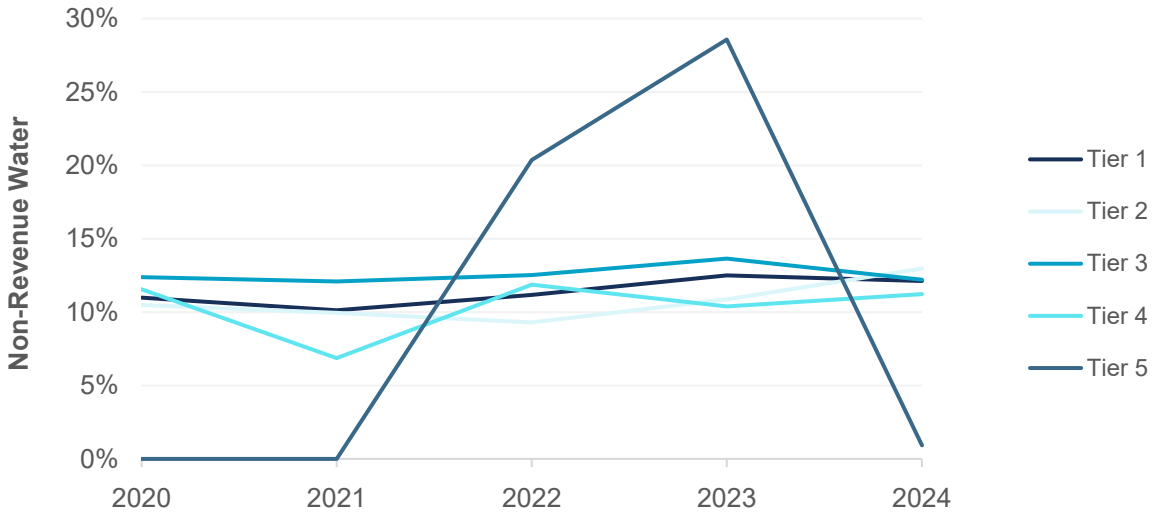
Australia's pipe network is reaching the end of its useful life and showing signs of persistent aging, with increasing non-revenue water loss.

- Most of Australia's 200,242-kilometer (km) water pipe network was constructed in the early and mid-twentieth century, with pipes currently beyond or reaching the end of their useful life.
- Major utility Sydney Water cited that almost 50% of its water and sewer network is over 50 years old. The aging infrastructure offers significant opportunities for engineering design firms across the country to support renewal projects.
- The majority of Australia's pipe network resides in dense, urban areas that serve roughly 37 connections per kilometer of pipe. In contrast, small and medium utilities in rural areas serve roughly 30 connections per kilometer of pipe. Solutions that provide remote network monitoring play a key role for rural utilities with more dispersed assets.
- Utilities lost roughly 360,000 megaliters of water, or 12% of water supplied, in 2024 from non-revenue water. Tier 1 utilities, in particular, have seen a 25% increase in non-revenue water over the last five years alone. As utilities focus on securing their water supply, reducing water loss in their pipe networks will be key.

Water Pipe Network



Annual Non-Revenue Water, 2020–2024

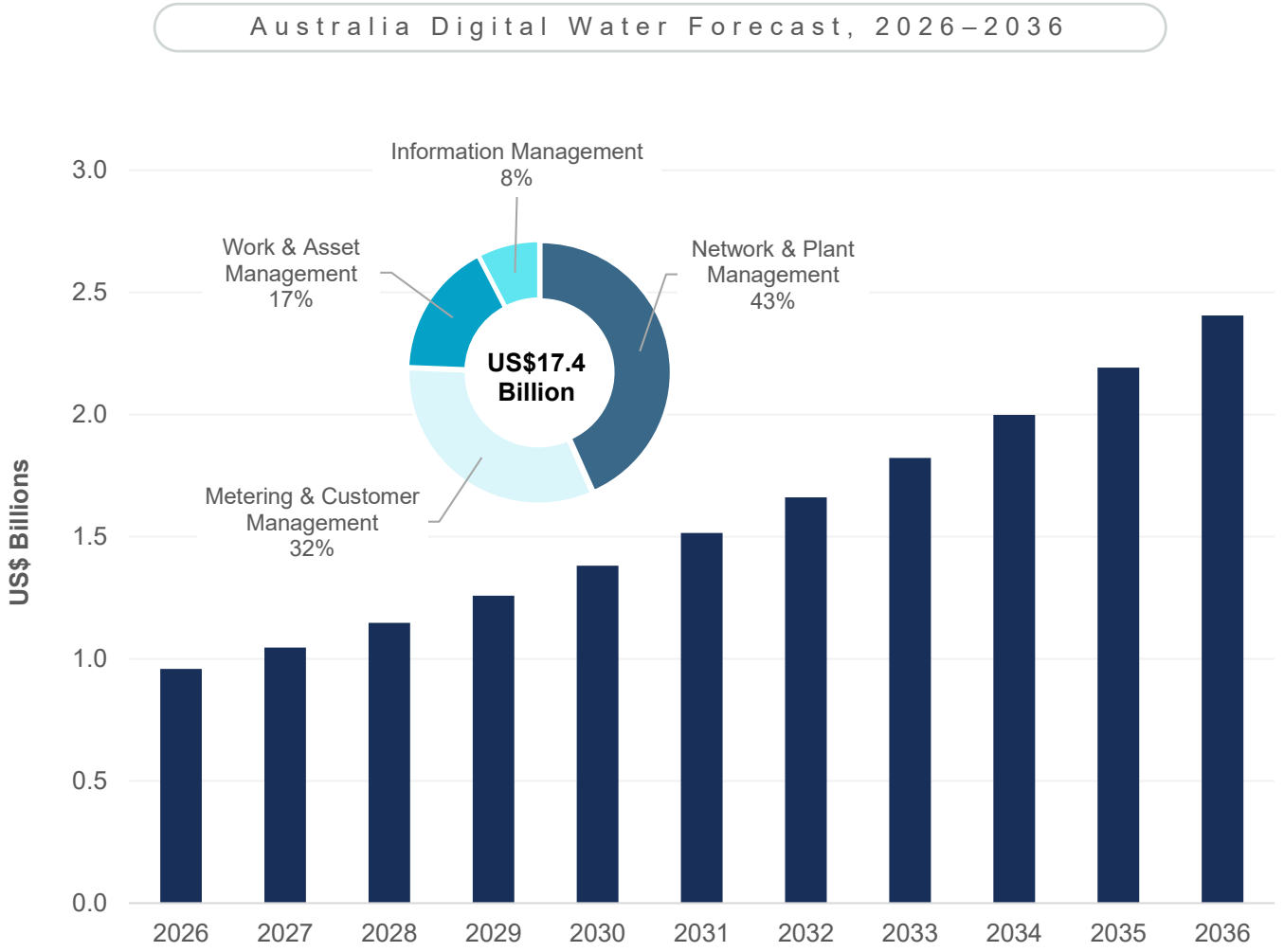


Source: Urban National Performance Report, Sydney Water, Bluefield Research

Australia Digital Water Landscape Opportunity

At a 9.6% CAGR, the country's digital water expenditures are set to more than double over the next decade as utilities invest in the technology they need for a resilient future.

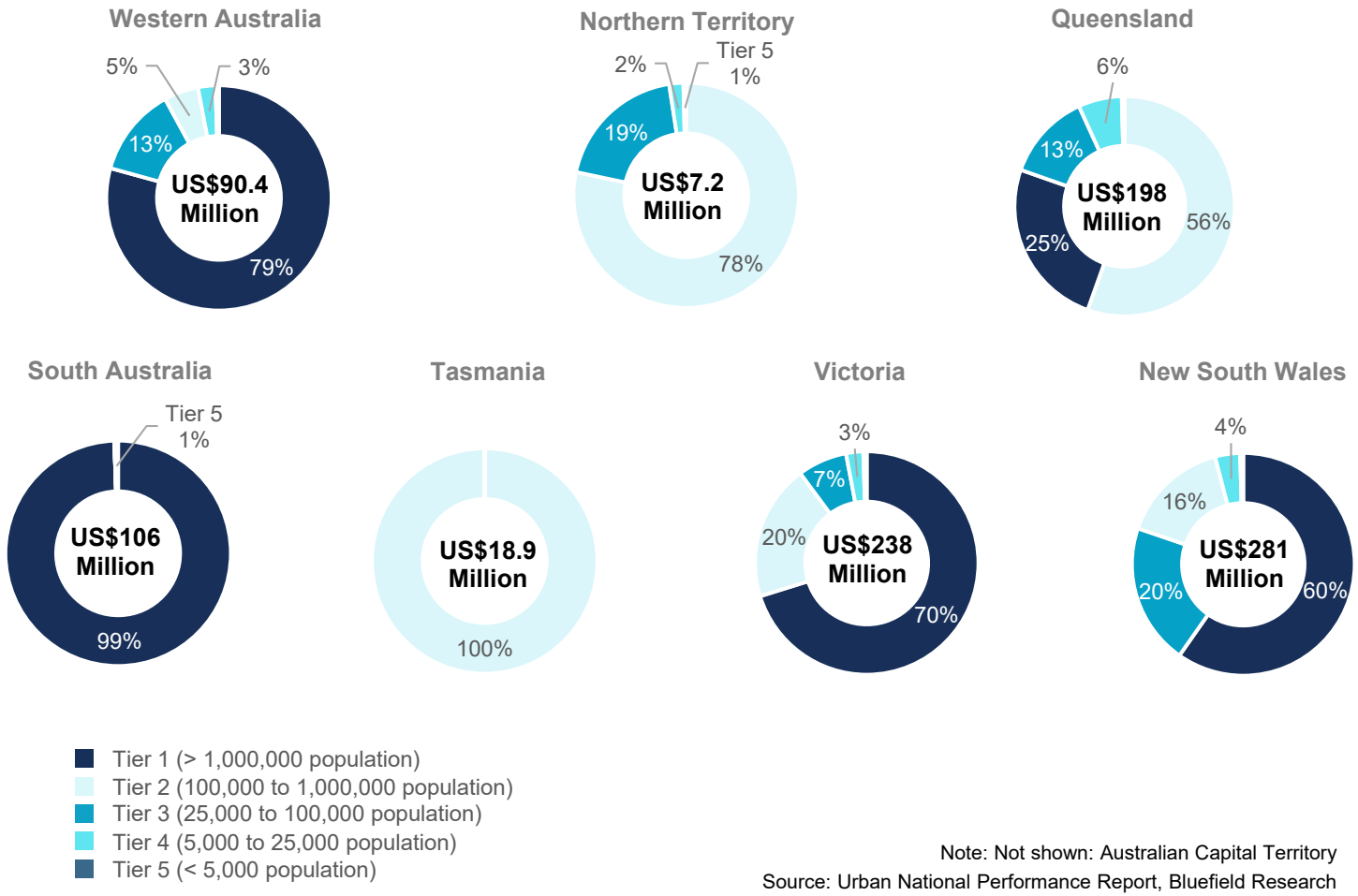
- Total expenditures on digital water solutions are expected to grow from US$958.6 million in 2026 to US$2.4 billion in 2036, with a CAGR of 9.6%.
- Demand in the Australian market is driven by the need for innovative solutions to improve the efficiency of water usage throughout the country to combat future droughts and increased population growth.
- Network and plant management solutions are the largest share of the digital landscape in Australia at 43.3%. Metering and customer management is the next-largest category and has the highest growth opportunity, with an 11.0% CAGR, driven by full-scale smart metering rollouts across utilities.
- The digital water market is concentrated in urban, Tier 1 utilities that have the funding and capacity to invest in new technology. Smaller, more rural utilities have fewer capabilities and rely on integration and implementation services to adopt new technologies.



Source: Bluefield Research

Digital Water Hotspots—Opportunity by State and Utility Tier

The majority of the digital water landscape is concentrated in Tier 1 utilities, and the cities of Sydney, Melbourne, and Brisbane alone account for 46% of the market in 2026.



Note: Not shown: Australian Capital Territory
Source: Urban National Performance Report, Bluefield Research

Hardware Vendor Capabilities

The flow/level and pressure sensor markets are the most saturated, with many vendors providing solutions for both. Overall, hardware is the anchor for digital companies in Australia to then integrate their data management and analytics platforms with utilities.

Hardware Vendor Capabilities

Increasing Portfolio Capabilities

Company	Flow/Level Rainfall Monitors	Water Quality Monitors	Leak Detection Sensors	Pressure Sensors	SCADA/RTUs	Metering/AMI	Dataloggers
Honeywell	●	●			●	●	●
Siemens	●		●	●	●		
Asea Brown Boveri (ABB)	●		●		●		
Taggle	●			●		●	●
Endress and Hauser	●			●			●
In-Situ	●	●					●
Iota			●	●			●
Kallipr	●			●			●
Metapshere	●			●	●		
Ovarro	●				●		●
TracWater	●	●		●			
Aqua Analytics			●	●			
Itron			●			●	
Advanced Drainage Systems (ADS)	●						
Landis and Gyr						●	
Sagemcom						●	
Schneider Electric					●		

● Capability ● Core Offering In Australia

Source: Companies, Bluefield Research

Table of Contents

List of Exhibits

Section 1.

Section 2.

Section 3.

Section 5.

Companies Profiled:

- ABB
- Autodesk
- Aqua Analytics
- Diehl Metering
- Detection Services
- EDMI
- Endress+Hauser
- Esri
- Honeywell
- Huizhong
- Idex Corporation
- Iota
- Itron
- Kallipr
- Landis+Gyr
- Ovarro
- Sagemcom
- Siemens
- Schneider Electric
- Suez
- Taggle
- Veralto
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Data dashboard

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ADVANCING WATER STRATEGIES

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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