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UK Smart Water Infrastructure: Market Forecast (2018 – 2027)

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The United Kingdom's water sector is in the midst of numerous structural changes that should allow the total value of its advanced metering market to more than triple in value by 2027. These are driven by advances in smart water infrastructure but more importantly by regulations that are among the strongest in the world in terms of mandating leakage reduction and managing water scarcity.

Investment will be unevenly distributed among the country's 12 utilities, which are responsible for planning and implementing their own strategies, given their operational, financial, and water resource constraints. The bulk of investment can be attributed to two factors – the continuation of the utilities'

existing metering policies and a substantial shift in the financial and economic regulatory structure that dictates which investments the utilities will be allowed to make. As a result, the majority of utilities have already established metering investment plans through 2030. With regulations trending towards increased conservation and criticism of water utilities increasing, it is likely that metering – and overall smart water infrastructure – will only increase throughout the next ten years. This will jumpstart a market that is noteworthy in the developed world for its low metering rate. Overall, the UK utilities will cumulatively invest nearly \$1.3 billion in smart water infrastructure over the next ten years.

Key questions answered in this study:

- What are each UK utilities' investment plans for the next ten years?
- How large will the smart water infrastructure market be in the UK?
- How quickly will UK water utilities switch to AMI metering?
- How will new regulations in 2019 affect the market?
- Who are the leading vendors in the market?

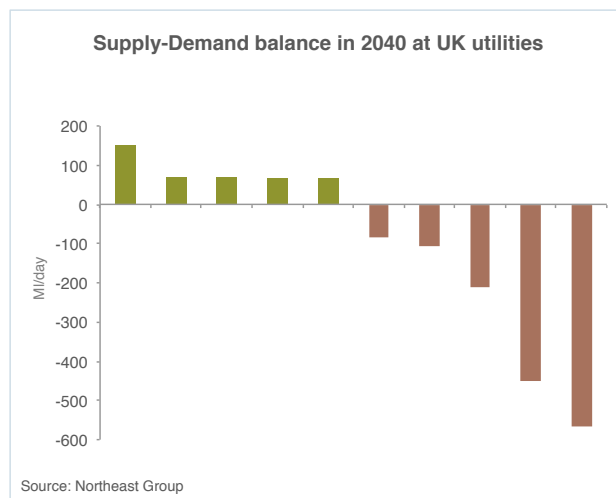
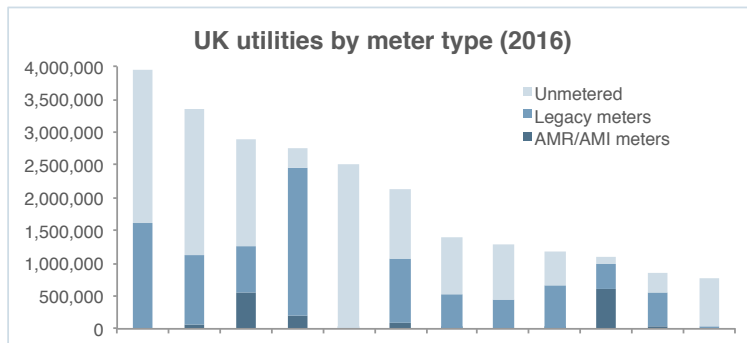


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