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## US Smart Water Infrastructure: Market Forecast (2017 – 2027)

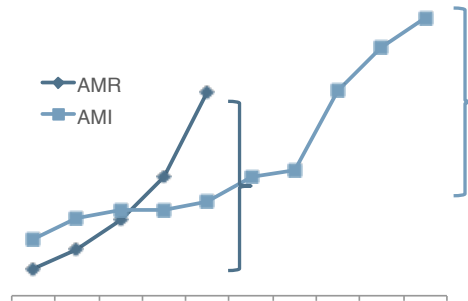
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## US Smart Water Infrastructure: Market Forecast (2017-2027)

The United States has the largest and most developed smart water infrastructure market in the world, and several trends point towards continued growth and development. Northeast Group conducted a survey of nearly 340 water utilities and found that the vast majority of respondents have completed or are interested in investing in smart water infrastructure. While

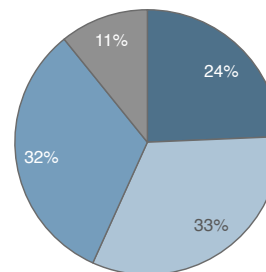
automated metering reading (AMR) and advanced metering infrastructure (AMI) water metering is already well developed in the US, still only approximately 60% of water customers have communicating meters, leaving ample room for market growth. Additionally, within the smart meter segment, both utilities and vendors have shown that the country is trending quickly towards AMI – even at smaller utilities. There is also an overall trend towards investing in smart city infrastructure and increased awareness of water scarcity in some parts of the country. This is creating clear growth opportunities throughout the smart water value chain.

All-in per-customer smart water meter costs in project survey



Northeast Group's survey revealed several challenges that utilities have faced, and a number of lagging utilities that are still not interested in smart water infrastructure. Vendors will need to continue to work to improve the logistics, financing, and technical capability of smart water infrastructure to overcome these hurdles. Additionally, there are no binding regulatory or urgent economic drivers that are expected to encourage a large-scale spike in near-term investment. But with multiple avenues for growth and an industry that more now than ever is seeking to modernize, the US smart water infrastructure market will represent investment value of \$8.3 billion cumulatively over the next ten years.

Project challenges reported by utilities in survey



Key questions answered in this study:

- What are the views of 90 US water utilities on smart water infrastructure investment?
- How large will the smart water infrastructure market be in the US?
- How quickly will US water utilities switch to AMI metering?
- What are the main drivers and barriers of smart water projects in the US?
- Who are the leading vendors in the market and how do they stack up in the survey?

**Table of Contents**

- i. Executive summary 1
- 1. Current state of US water market 3**
- 2. Survey results 8**
- 3. Market forecast 15**
- 4. Drivers and barriers 20**
- 5. Case studies 32**
- 6. Vendors 49**
- 7. Appendix 60**
  - Appendix I: US water industry structure 60
  - Appendix II: Smart water overview 65
  - Appendix III: Utilities providing data 71
  - Appendix IV: Company and abbreviation lists 76

## List of Figures and Tables

US smart water infrastructure: Key takeaways	2
Figure 1.1: AMI vs. AMR for water metering (cumulative and annual)	3
Figure 1.2: Potential AMI market	4
Figure 1.3: LPWAN IoT options	5
Table 1.1: Additional infrastructure and applications that can be part of communications deployment for AMI water metering	6
Figure 2.1: Overall survey responses	8
Figure 2.2: Responses from in-depth interviews	8
Figure 2.3: US water utilities by % of customers served	10
Figure 2.4: Size of utilities interviewed for smart water survey	10
Figure 2.5: AMI vs AMR choices	11
Figure 2.6: All-in per-customer smart water meter costs in project survey	11
Figure 2.7: Follow-up projects	11
Figure 2.8: Meter hardware and communications vendors used in smart water projects identified in survey	12
Figure 2.9: Project drivers reported by utilities in survey	13
Figure 2.10: Project challenges reported by utilities in survey	14
Figure 3.1: US water meter forecast (cumulative)	15
Table 3.1: US water meter forecast data	15
Figure 3.2: Total US smart water forecast (cumulative)	16
Table 3.2: US water meter forecast data	16
Figure 3.3: Responses from interviews	17
Figure 3.4: AMI vs. AMR vs. legacy for water metering (cumulative)	18
Figure 4.1: Project drivers reported by utilities in survey	20
Figure 4.2: Percentage of interviewees mentioning specific operational efficiency sub-drivers	21
Table 4.1: Utility comments about operational efficiency	22
Figure 4.3: Percentage of interviewees mentioning specific modernization sub-drivers	23
Table 4.2: Utility comments about general modernization	24
Figure 4.4: Percentage of interviewees mentioning specific conservation sub-drivers	25
Table 4.3: Utility comments about NRW and conservation concerns	25

## List of Figures and Tables (cont.)

Figure 4.5: Project challenges reported by utilities in survey	26
Table 4.4: Utility comments about project financing	27
Figure 4.6: Percentage of interviewees mentioning specific logistics sub-drivers	28
Table 4.5: Utility comments about logistical challenges	29
Figure 4.7: Percentage of interviewees mentioning specific concern over technology sub-drivers	30
Table 4.6: Utility comments about technology concerns	31
Figure 5.1: Case studies	32
Table 5.1: MWU AMI drivers, challenges, and benefits	34
Figure 5.2: Project costs and savings in Asheville, NC	36
Table 5.2: SBMWD challenges to implementation	38
Table 5.3: PWS cellular infrastructure service options	41
Figure 5.4: AMI expenditure at Kennebec, Maine	47
Figure 6.1: Meter hardware and communications vendors used in projects identified in survey (number of utilities served)	49
Figure 6.2: Meter hardware and communications vendors used in projects identified in survey (number of customers served)	50
Table 6.1: Other smart water analytics vendors	59
Table 7.1: US water utilities by size	60
Figure 7.1: US water system organization	61
Figure 7.2: Ten largest US public water utilities	61
Table 7.2: Largest private water utilities in the US	62
Figure 7.3: Private ownership of community water systems by service population	62
Figure 7.4: Average household monthly water bills	63
Table 7.3: Leading challenges cited by US water utilities	64
Figure 7.5: Smart water value chain	65
Figure 7.6: Water supply chain	66
Figure 7.7: Five layers of smart water networks	67
Table 7.4: Benefits of different water metering technologies	68
Table 7.5: US water utilities providing in-depth interviews	71
Table 7.6: US water utilities providing project data	72
Figure 7.8: Utilities contacted as part of survey by state	74

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