



WATER BUSINESS

Indian Water Industry

Indian Water Industry Overview

The Indian market for water and wastewater treatment is anticipated to expand as the nation sees an increase in private investments, as well as the government's implementation of new business models drawing in remote market participants and hastening the industry's expansion.

The Indian government has launched several programmes to promote the development of wastewater treatment infrastructure, such as the Atal Mission for Rejuvenation and Urban Transformation (AMRUT) which aims to provide basic services like water supply and sewerage to households in urban areas. Additionally, the Namami Gange programme focusses on the cleaning of the Ganga River and its tributaries, which involves the construction of wastewater treatment plants along the river.

The private sector has also been investing in wastewater treatment, particularly in the industrial sector and also in Municipal sector wherever Recycle & Reuse opportunities exists for treated wastewater. Many large industries have set up their own wastewater treatment plants to comply with environmental regulations and reduce their water footprint.

Despite the growth in the industry, there are still challenges that need to be addressed, such as lack of skilled

manpower, inadequate funding and inefficient regulatory frameworks. However, the Indian government and private sector are working towards overcoming these challenges and building a more sustainable and efficient wastewater treatment industry.

The Triveni Water Business Group (WBG) is pursuing opportunities with various clients in Engineering Procurement Construction (EPC) and Hybrid Annuity Mode (HAM)/ Public Private Partnership (PPP) projects. We are also exploring PPP opportunities for STP recycling in PPP format.

Current Water Opportunities

The water industry in India has seen significant growth in recent years, driven by increasing awareness of water scarcity and pollution. The industry includes a wide range of technologies and services, such as wastewater treatment, desalination, water purification, and distribution.

To address the water crisis, the Indian government has launched several initiatives and policies to promote water conservation, reuse, and treatment. The government's flagship programmes, the National Rural Drinking Water Program (NRDWP) and Jal Jeevan Mission (JJM), aim to provide safe drinking water to all rural households by 2024. The National Mission for Clean Ganga (NMCG) is another initiative aimed at cleaning the Ganga River and its tributaries.

This presents significant opportunities for growth and investment, driven by the country's growing water crisis and increasing demand for water treatment services. The new opportunities are expected to come from all over India, as various projects are in planning stage and several are undergoing tendering.

We are also exploring opportunities in international markets.

GLOBAL WATER INDUSTRY

Global Water Industry Overview

The global water treatment industry is expected to grow at a CAGR of 7.1% from 2022 to 2029, reaching a market size of USD 489.07 billion by 2029. The growth of the market is driven by a number of factors, including increasing population, rising urbanisation, and growing environmental concerns.

- Increasing population:** The global population is expected to reach 9.7 billion by 2050, putting a strain on the world's water resources. This will lead to an increased demand for water treatment services, as more and more people will need access to safe and clean water.
- Rising urbanisation:** The world is becoming increasingly urbanised, with more and more people living in cities. This is leading to increased pollution of water resources, as urban areas generate more wastewater than rural areas. Water treatment will be essential to ensure that the growing urban population has access to safe and clean water.
- Growing environmental concerns:** There is growing awareness of the environmental impact of water pollution. This is leading to increased regulations on water quality, which will require more water treatment facilities to be built.
- Increasing demand:** The demand for water treatment solutions continues to rise due to factors such as population growth, urbanisation, industrialisation, and climate change. This demand growth is observed across various sectors, including municipal, industrial, and commercial.
- Water scarcity:** Water scarcity remains a significant global concern, with many regions experiencing water stress or facing Water Management practices and shortages. This situation drives the need for effective water treatment technologies to optimise water use, recycle and reuse wastewater, and develop alternative water sources.
- Stringent regulations:** Governments and environmental agencies worldwide are implementing stricter regulations to address water pollution and ensure safe drinking water standards. These regulations require industries and municipalities to adopt advanced water treatment technologies and adhere to stringent water quality standards.
- Advancements in technology:** The water treatment industry is witnessing rapid technological advancements. Innovations include membrane filtration, advanced oxidation processes, desalination, biological treatment methods, smart monitoring systems, and

