



Advanced Leakage Management Solutions: Drivers and Spend Forecast

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THE GLOBAL
LEAKAGE SUMMIT



Agenda



- 01 Water Sector In Europe
- 02 Drivers for Digital Adoption in Utilities
- 03 Europe Forecast: Digital Monitoring Solutions
- 04 Europe Forecast: Advanced Network Management

Infrastructure, workforce, regulation, and climate challenges bolster the case for digital solution investments.



Key Water Sector Challenges

Infrastructure & Assets



Water Losses



Energy-efficiency



Aging & Underfunded
Infrastructure



Workforce Capacity

Regulation & Environment



Climate Resilience



Pollution



Regulatory Compliance



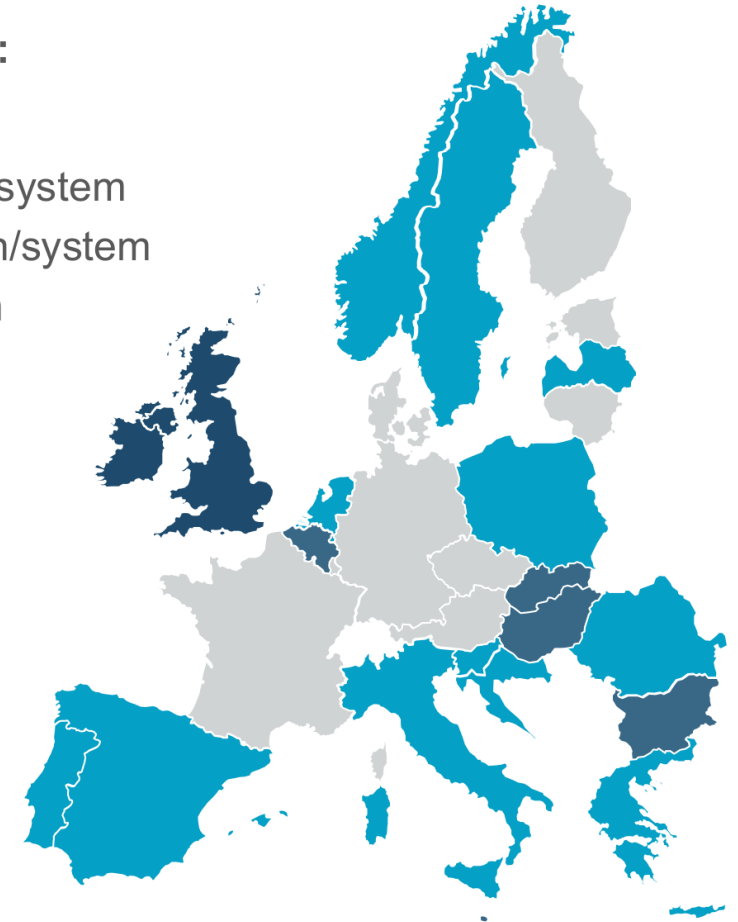
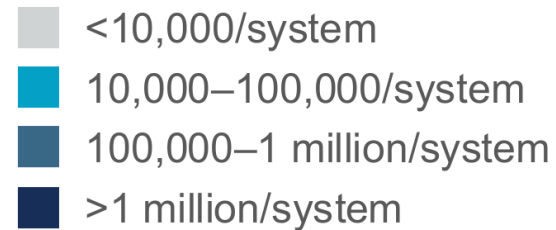
Regional Inequities

Source: Bluefield Research

The addressable market for digital water varies significantly by country and region based on utility fragmentation, location, size, income level, and digital maturity.

Market Fragmentation per Country

Inhabitants/System:

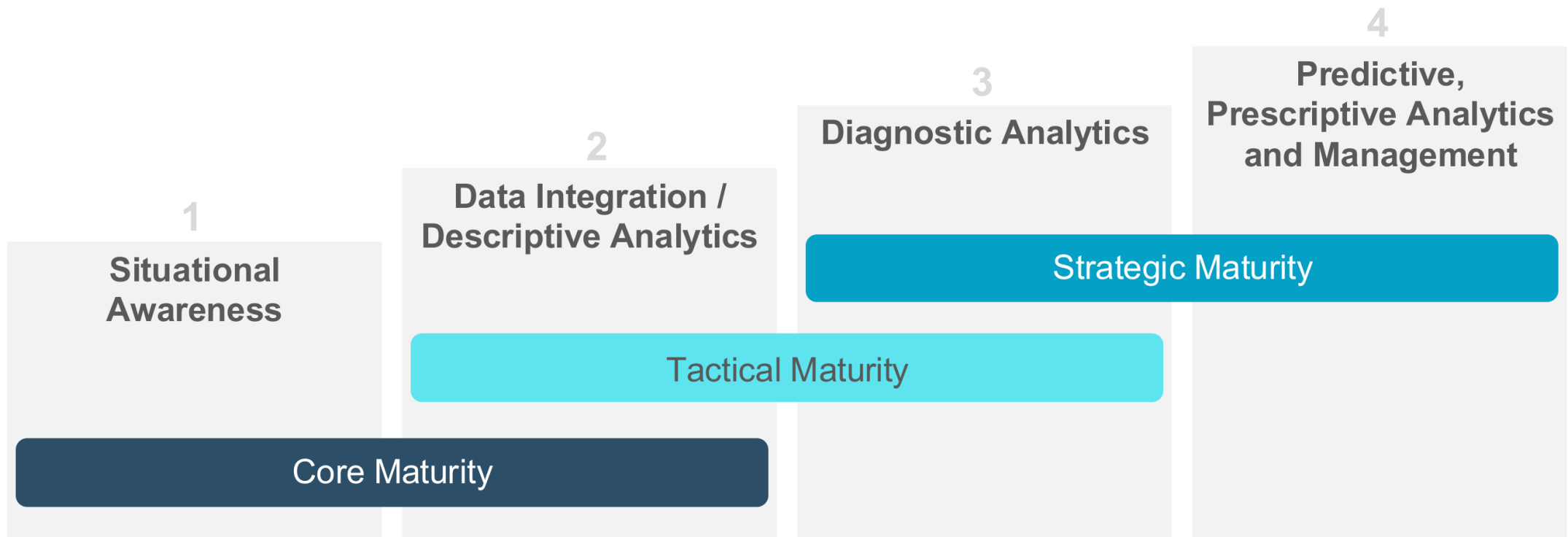


Source: Bluefield Research

Two major factors influence utilities' use of digital solutions—operational efficiency and cost reduction targets.



Utility Digital Maturity Stages

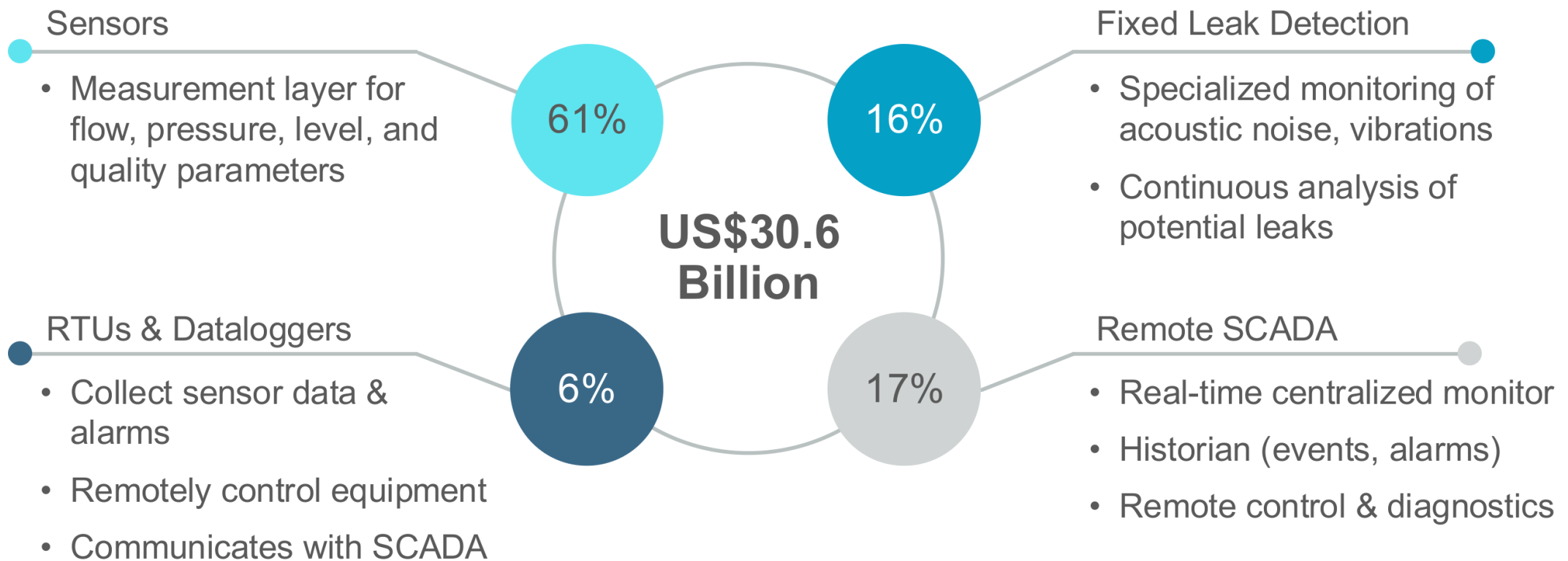


Source: Bluefield Research

Hardware-based water solutions dominate spending as utilities shift from periodic asset inspections to continuous monitoring.



Hardware-Based Water Network Spend

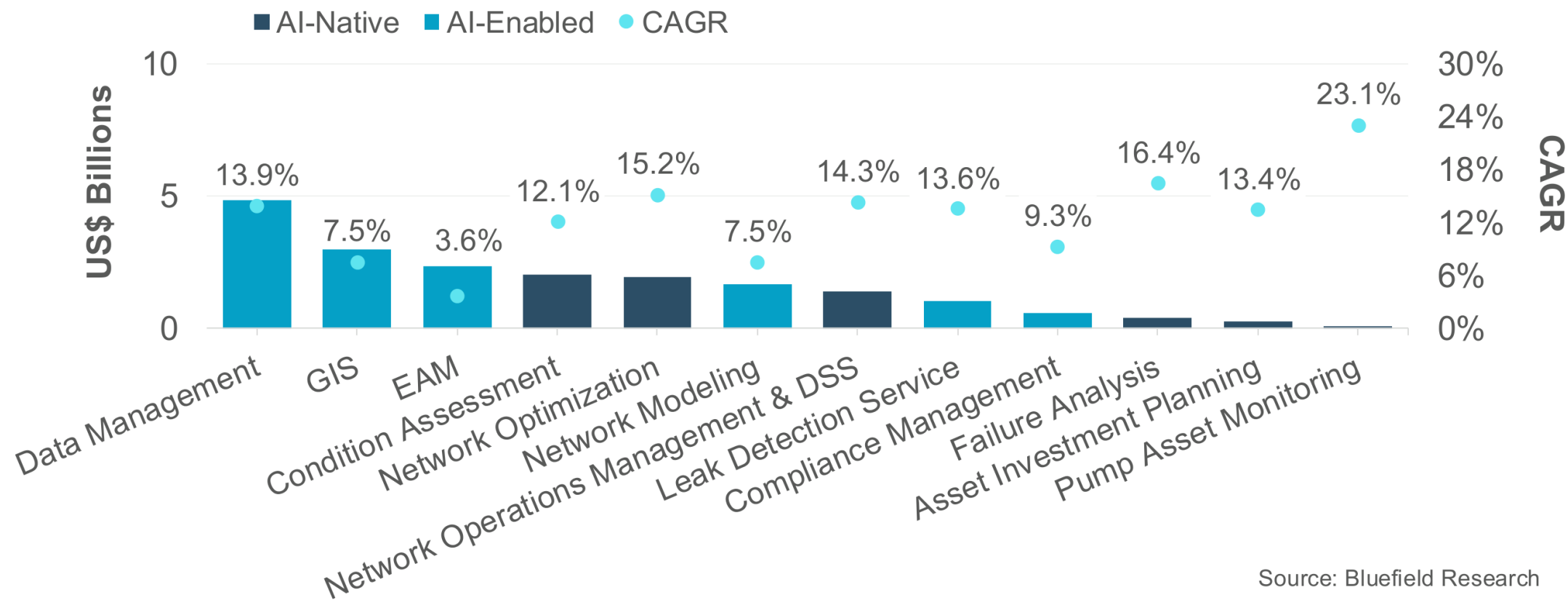


Source: Bluefield Research

Growth opportunity lies above the data layer; automation, optimization, and decision support offer the highest-value play.



AI Segment Market Size, 2026–2036



Source: Bluefield Research

Summary

- Network operations and management challenges support the investment case for digital solutions.
- Utility investment is driven by operational efficiency and cost reduction targets.
- Hardware-heavy solutions lay the groundwork for information capture, totaling US\$30.6 billion spend only in water networks across Europe.
- Advanced digital solutions offer the highest-value play operationalize data, growing at an average 12.5% CAGR.

#thinkwater

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We are here to help. Our team is available for individual client discussions or deeper dives on our water market analysis.

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