

WATER SECTOR PPP MARKET



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InfraPPP
Reports

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1. INTRODUCTION



1.1. Introduction

Water sector

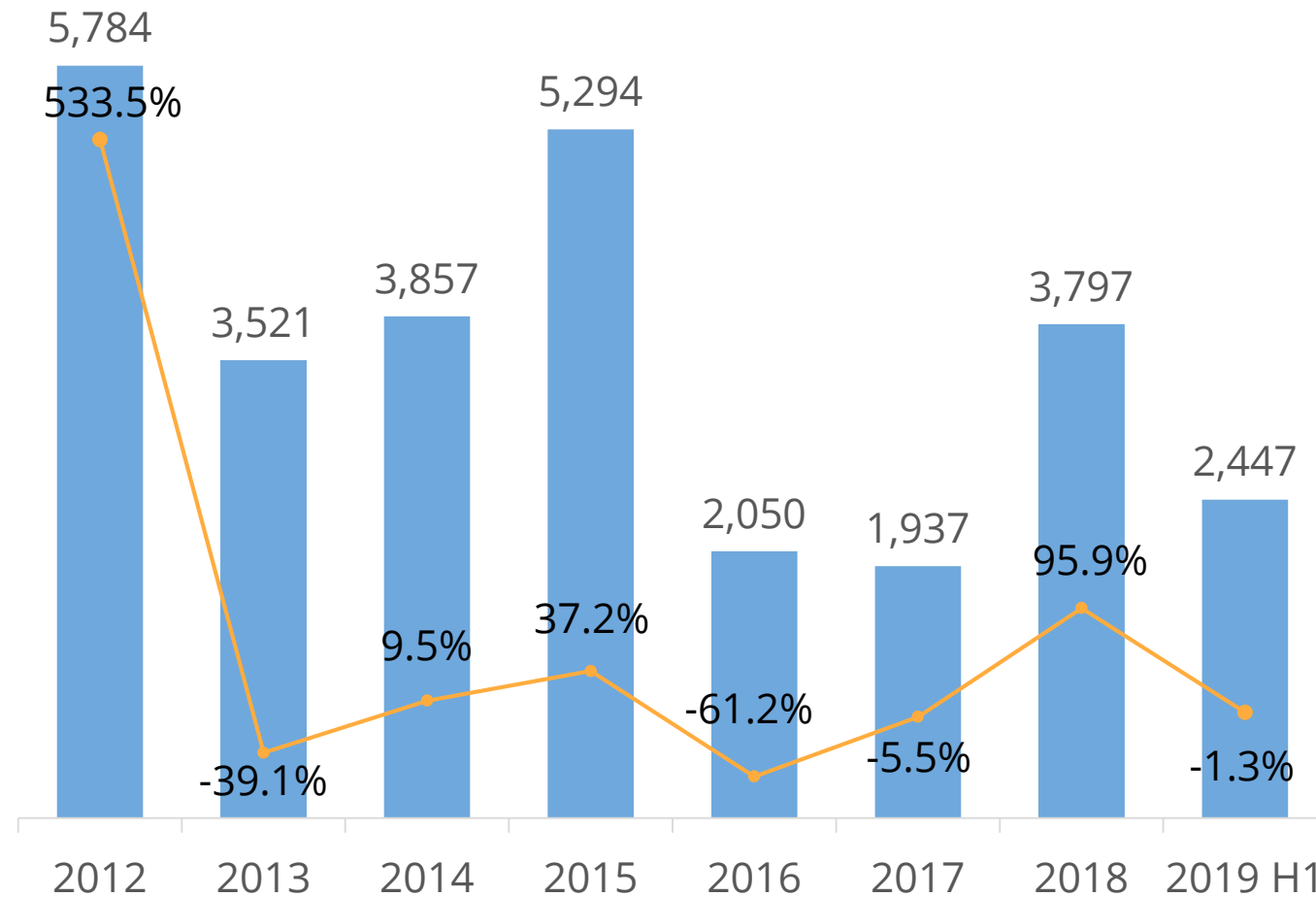
Water is crucial in many aspects of life, so it is very important to invest in establishing and managing the appropriate infrastructures where needed. PPPs help governments develop different projects and use technology and innovations to improve the sector.

However, the **PPP water sector** is one of the **less exploited** sectors in the industry, it represents less than one third of the energy PPPs developed during the last decade. Nevertheless, the sector has managed to **evolve positively** since 2012, increasing the investment volumes in comparison to the previous years.

According to InfraPPP World Database, since 2013, over **650 water PPPs** have been developed all around the globe, which amount to an investment value of more than **USD 100 billion**.

1.2.1 Investment volume. Water sector.

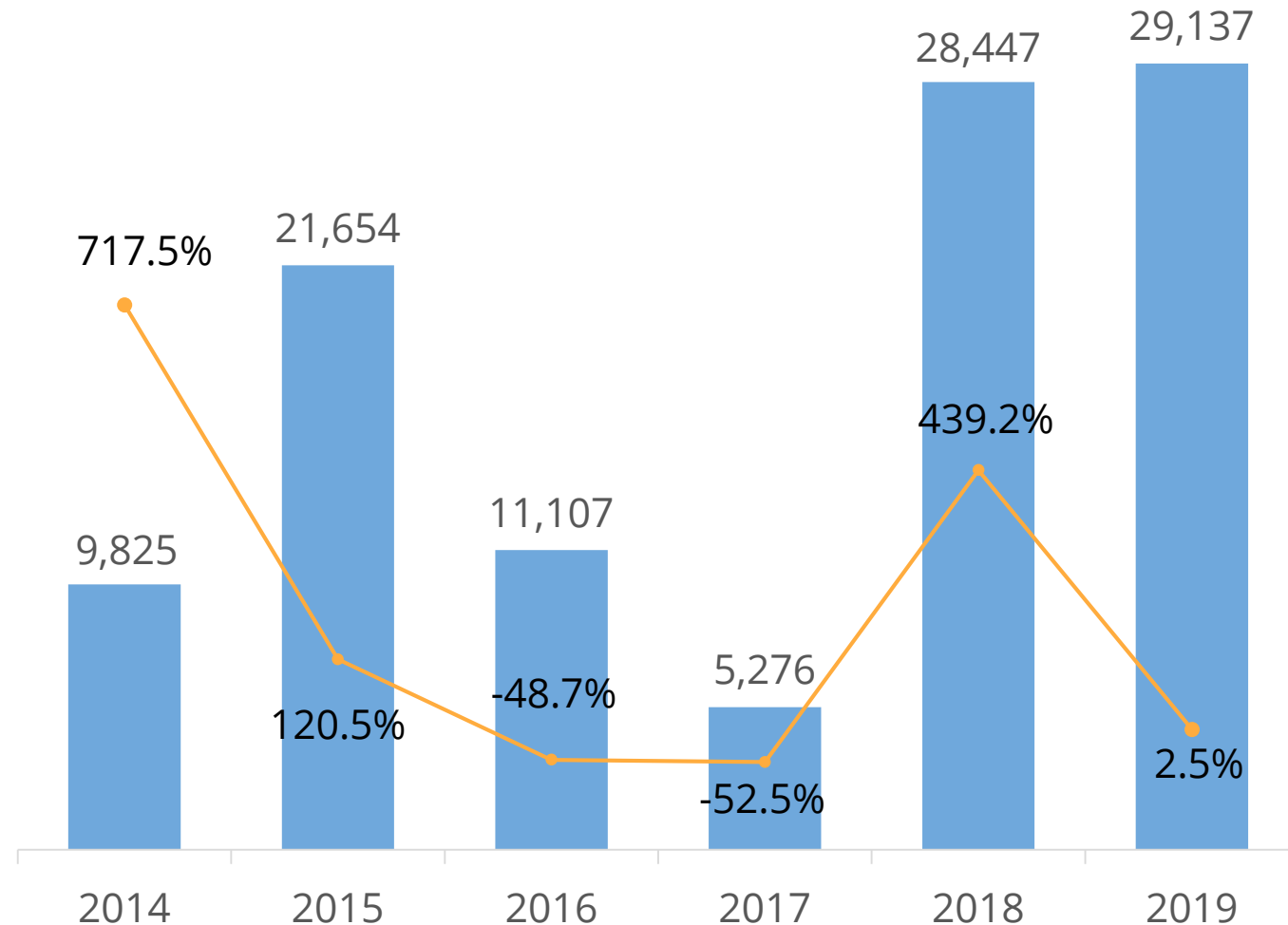
USD (MM) and growth (%). 2012 – 2019 H1



The evolution of the investment volume in the sector has been quite **irregular** during the last years, with an increase of 95.9% of the investment volume in 2018. During the first half of 2019 the total investment has reached USD 2,447 million.

1.2.2 Investment volume. Water sector.

USD* (MM) and growth (%). 2014 – 2019



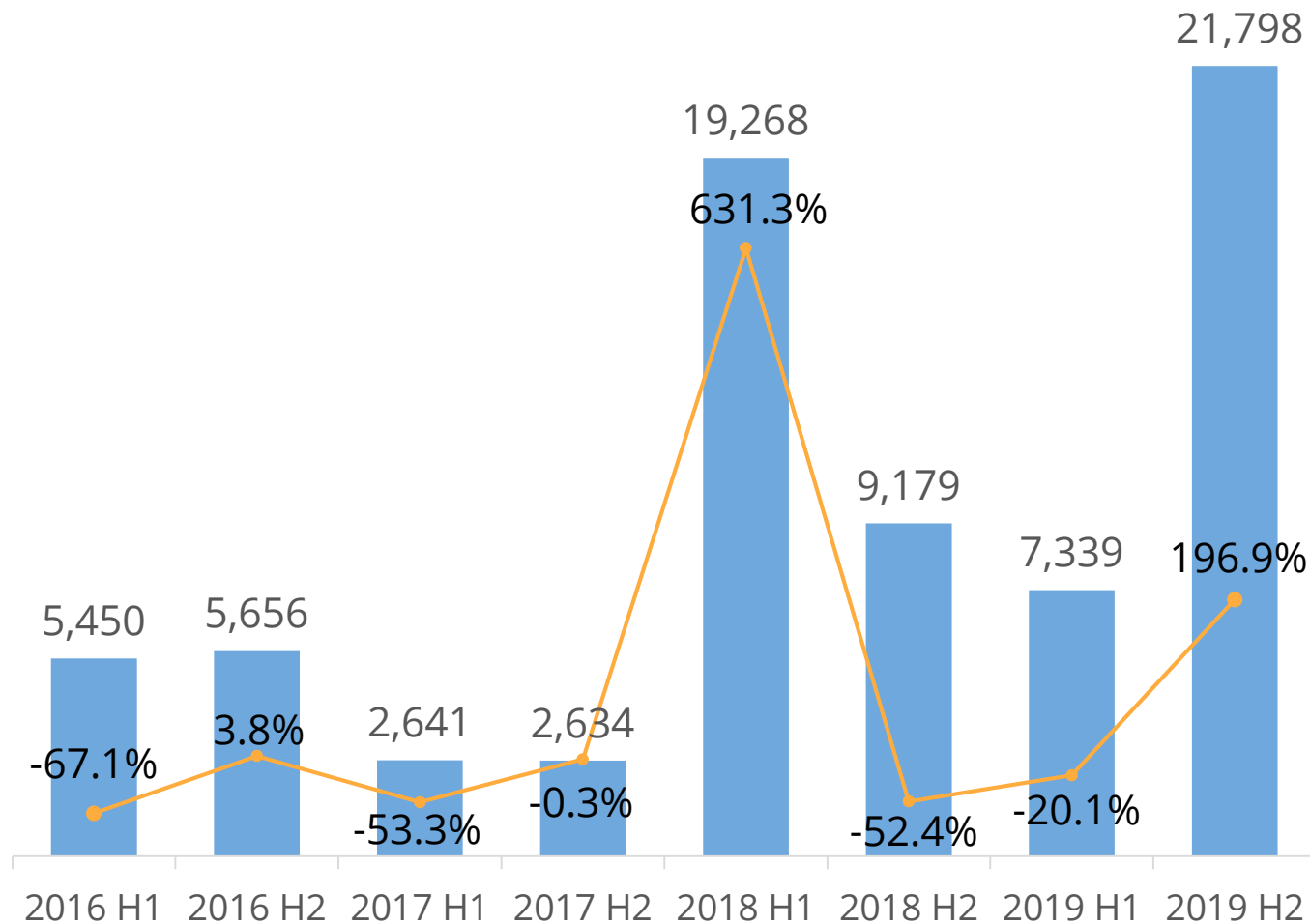
The evolution of the investment volume in the sector has been irregular during the last years, with an increase of 439.2% in the investment volume in 2018. However, in 2019, we can appreciate signals of growth, with an increase of 2.5%.

Source: InfraPPP World

*Not all projects' financial data available

1.2.3 Investment volume. Water sector.

USD* (MM) and growth (%). 2016 H1 – 2019 H2



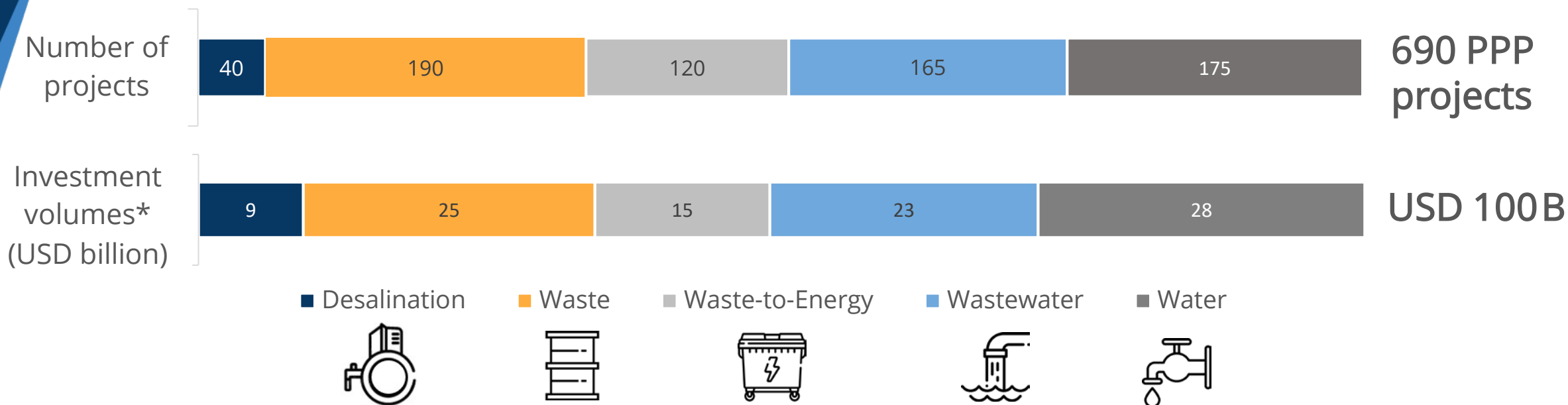
The evolution of the investment volume in the sector has been irregular during the last years, with an increase of 631.3% in the first half of 2018. However, during 2019, we can appreciate signals of progress, reaching a 196.9% growth in the second semester of the year.

2. PPP ACTIVITY



2.1. PPP Project portfolio by subsector (Water sector)

Number of projects and investment volumes* in USD



Waste subsector leads the Water PPP market in number of projects (190 PPP projects) while **Water** subsector outstands in investment volumes (USD 28 billion). **Waste**, **Wastewater** and **Waste-to-energy** also share an important part of the investment on PPP projects.

Note: The total amount of projects and investment involve all the projects in different stages until December 2019.

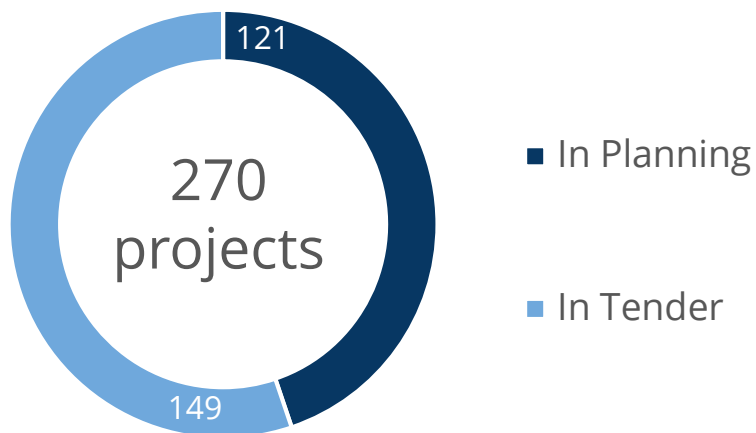
*Not all projects' financial data available

Source: InfraPPP World Project Database 2019

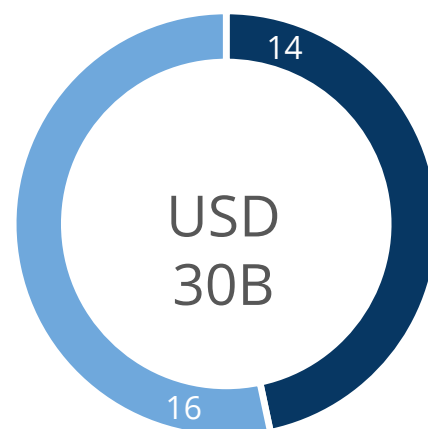
2.2. PPP Project portfolio by stage (Water sector)

Projects in pipeline (in planning + in tender*)

Number of projects



Investment volumes** (USD billion)



The water sector has a pipeline composed of 270 PPP projects involving a total forecasted investment of USD 30 billion:

- **In planning:** 121 projects – USD 14 billion.
- **In tender:** 149 projects – USD 16 billion.

*PPP projects at planning or tender stage.

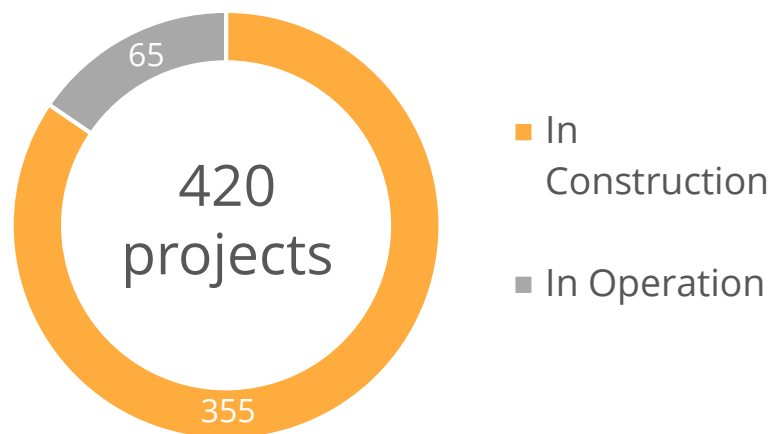
**Not all projects' financial data available

Source: InfraPPP World Project Database 2019

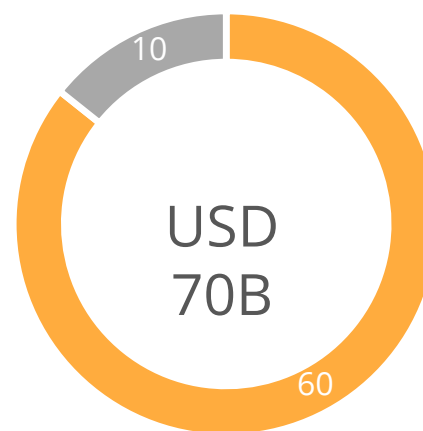
2.3. PPP Project portfolio by stage (Water sector)

Active projects (in construction + in operation)

Number of projects



Investment volumes* (USD billion)



The water sector has a total of **420 active PPP projects** involving a total investment of **USD 70 billion**:

- **In construction**: 355 projects - USD 60 billion.
- **In operation**: 65 projects - USD 10 billion.

*Not all projects' financial data available

Source: InfraPPP World Project Database 2019

3. TOP COUNTRIES



3.1. Top PPP sector competitors.

PPP Activity and investment volumes* in USD 2018-2019

PPP projects in Pipeline
PPP projects active



UNITED KINGDOM

- Number: 4
- Value: USD 2.1B

- Number: 13
- Value: USD 11B



CHINA

- Number: 2
- Value: USD 0.3B

- Number: 55
- Value: USD 3.4B



UNITED STATES

- Number: 6
- Value: USD 3B

- Number: 4
- Value: USD 0.5B



BRAZIL

- Number: 8
- Value: USD 3B

- Number: 2
- Value: USD 0.4B

*Not all projects' financial data available
Source: InfraPPP World Project Database 2019

4. TOP PROJECTS



4.1. TOP PPP projects in pipeline. Water.

Biggest projects in pipeline by investment volume – 2018/19

Source: InfraPPP World Project Database 2019

Fargo-Moorhead flood prevention PPP project



- Country: USA
- Sector: Urban Infrastr.
- Stage: In tender
- Value: USD 2.8B
- Description:

The project includes three main components: in-town flood protection, a diversion channel, and the Southern Embankment that consists of flood control structures and areas for temporarily staging floodwaters.

Sewage treatment PPP project in Porto Alegre



- Country: Brazil
- Sector: Wastewater
- Stage: In tender
- Value: USD 2.4B
- Description:

Development of sewage collection and treatment services in the metropolitan region of Porto Alegre. Porto Alegre is the capital city of the state of Rio Grande do Sul located in southern Brazil..

Sinfin Lane Waste Treatment Facility



- Country: UK
- Sector: Waste
- Stage: In planning
- Value: USD 1.2B
- Description:

Management, operation, and maintenance of nine regional Household Waste Recycling Centers and management of the transfer stations, as well as the transportation of residual waste and its treatment and disposal.

Underground North Aqueduct PPP Project



- Country: Argentina
- Sector: Wastewater
- Stage: In planning
- Value: USD 1.2B
- Description:

Development of an Underground North Aqueduct project through a public private partnership in Buenos Aires.

4.2. TOP PPP active projects. Water.

Biggest active projects by investment volume – 2018/19

Source: InfraPPP World Project Database 2019

Thames tideway tunnel (TTT) project



- Country: UK
- Sector: Wastewater
- Stage: Financial close
- Value: USD 4.9B
- Description:

Part of the sewer network which will carry sewage and storm water discharges from the broader sewerage system.

The tunnel will be approximately 25km long, 7.2m in diameter and will run up to 65 meters below the River Thames.

Facility D natural gas-fired power generation and desalination project



- Country: Qatar
- Sector: Oil & Gas
- Stage: Financial close
- Value: USD 3.2B
- Description:

Construction, ownership, and operation of a natural gas-fired combined-cycle power plant with a total capacity of 2400 MW, and a desalination plant with a total capacity of 590 thousand cubic meters per day.

Az Zour North Independent Water & Power Project (IWPP)



- Country: Kuwait
- Sector: Oil & Gas
- Stage: In operation
- Value: USD 1.8B
- Description:

Construction of a gas-fired combined cycle power plant of at least 1,500MW and an associated water desalination plant with a capacity of 102 to 107 MIGD.

Cornwall waste PFI



- Country: UK
- Sector: Waste-to-Energy
- Stage: In operation
- Value: USD 1.8B
- Description:

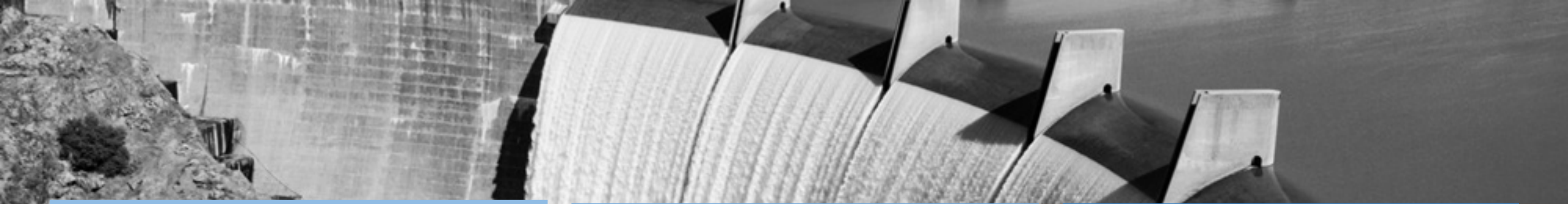
Design, build, finance and operation of an energy-from-waste facility in St Dennis with a capacity of up to 240,000 tonnes per year, which will generate electricity for the equivalent of around 21,000 homes.







5. TOP PLAYERS

5.1. TOP PPP Projects Players (Water)





Number of deals* and investment volume** - 2018/19



PROJECT OWNERS

-  CEI: 85 Deals. USD 2.5B
-  Citic: 8 Deals. USD 0.2B
-  Acciona: 7 Deals. USD 1.7B
-  Veolia: 6 Deals. USD 1.5B

FINANCIAL ADVISORS

-  Deloitte: 3 Deals.
-  SCG: 2 Deals.
-  BBVA: 2 Deals.
-  KPMG: 2 Deals.

LENDERS

-  SMBC: 6 Deals.
-  Mitsubishi UFJ: 6 Deals.
-  Mizuho Bank: 5 Deals.
-  Siemens Bank: 4 Deals.

*Deals: Operations involving PPP projects

**Not all projects' financial data available

Source: InfraPPP World Project Database 2019

If you are interested in getting more details about PPP projects within the water sector, click the image below to visit our **PPP Reports** section and download this report's projects spreadsheet:

InfraPPP Reports



The excel spreadsheet lists all of the PPP projects in development in the water sector in the InfraPPP database.

Projects are organised by stage, with listings spanning from projects in planning to those in operation.

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