

## South African Municipal Water and Wastewater Treatment Equipment End-User Analysis

**Description:** This Frost & Sullivan research service titled South African Municipal Water and Wastewater Treatment Equipment End-User Analysis provides a detailed analysis of municipal customers' perceptions of the services received from water and wastewater treatment equipment suppliers. The study also offers an insight into market forces and challenges, the customers' purchase drivers, an evaluation of equipment suppliers' performance, future market opportunities and strategic focus areas. These insights were gained through in-depth interviews with thirty-five large municipalities across South Africa as well as other significant stakeholders.

### Growing Demand for Clean Water and Increasing Municipal Infrastructural Budget by Government Drive Market Growth

According to a recent Frost & Sullivan study based on in-depth interviews with municipal end users in the water and wastewater treatment equipment market in South Africa, the market is on a growth projectile and there are significant opportunities for new installations. Moreover, the emerging market for upgrading, expansion and maintenance of aging water treatment plants is expected to offer further scope for growth. Findings revealed that municipalities held clear views on the desired product attributes and the type of suppliers they looked for to meet their needs.

"All the major municipalities have embarked on expansion, upgrading or installation of new water and wastewater treatment equipment to cope with the rising demand for water and sanitation," explains the analyst. "This demand is driven by population growth, economic growth and rapid urbanisation." Accordingly, the municipalities' budget for new water and wastewater treatment projects is in excess of \$300 million, while that of expansion and upgrading of treatment equipment is estimated to be more than \$265 million in the next two to three years. The spending power of most municipalities has been significantly improved by the government's initiative to increase the municipalities' infrastructure budgets. Moreover, the South African Government is set to spend in excess of \$50 billion as the ASGISA programme unfolds.

### Quality, Reliability and Affordability of Equipment Emerge as Essential Product Attributes

In the selection of treatment equipment, municipal end users indicated that the quality of final water or effluent produced by the equipment was the most important factor. In addition, good quality equipment with low maintenance costs, reliability and affordability were other crucial features. Besides, the customer service and support offered by suppliers to complement the semi-skilled staff of municipalities played a key role in the selection of a supplier. Moreover, the supplier's industry experience, cost competitiveness and the ability to offer systems warranty were also considered. While the majority of municipalities indicated that they are satisfied with the quality of products offered by most suppliers, it is apparent that the level of customer service will need to be improved.

"Despite positive trends, the municipalities' will to invest in water treatment equipment is hampered by factors such as the shortage of skills required to operate new technology, the bureaucratic decision-making process and the lack of awareness among a few key decision makers regarding the availability of new technologies and their benefits," explains the analyst. "Given this situation, success in the market can be achieved by suppliers which offer good quality equipment with low maintenance costs, coupled with a comprehensive training package to augment the municipalities' limited skills."

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