

India Stormwater Management Market Assessment, By System [Screening Systems, Separation Systems, Filtration, Infiltration, Retention Systems, and Other Systems], By Type [Detention Ponds, Retention Ponds, On-Site Detention, Rainwater Harvesting, Others], By Application [Municipal, Commercial, Residential, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

India stormwater management market is projected to witness a CAGR of 9.67% during the forecast period FY2025-FY2032, growing from USD 402.8 million in FY2024 to USD 842.93 million in FY2032. The market has experienced significant growth in recent years and is expected to maintain a strong pace of expansion in the coming years.

The rapid urbanization in India's major cities like Delhi, Chennai, Mumbai, Hyderabad, Bangalore, and other cities has delivered scope for advanced water management. With highly advanced infrastructure and robust roads, houses, societies, and sewage systems, sustainable water management becomes crucial. Residential societies highly require stormwater infrastructure to deal with urban flooding. For example, Bangalore needs an immediate stormwater drainage masterplan and remedial measures to curb urban flooding as a rising population and changing topography have heavily impacted the city's drainage system.

A mix of urbanization tendencies, effects of climate metamorphosis, laws to maintain water resources, and scientific progress characterized by an increased need for better stormwater structures are some of the issues influencing the Indian stormwater management market. For instance, in March 2024, the Public Works Department (PWD) announced its preparation to upgrade the automatic stormwater management systems at four important central Delhi locations: Pragati Maidan, Minto Bridge, Azad Bhawan, and ITO. This is part of PWD's preparations for the monsoon season. During the most recent monsoon, three of these places experienced flooding due to malfunctioning of water management systems.

Increasing Urban Flooding and Outdated Drainage Systems to Propel the Market Growth

Indian cities are seeing more frequent and severe urban flooding situations, particularly during monsoons, because of increased

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urbanization, the disappearance of lakes and wetlands, and decreased infiltration. For instance, annual flooding occurs in Bangalore, Delhi, and Chennai due to rainfall ranging from 790 to 1400 mm. Many Indian cities lack adequate stormwater drainage systems. According to the 2011 Census, 33% of dwellings merely have open drainage systems, while 48.9% of households have no drainage facility at all. The current drainage systems are frequently ill-maintained, poorly built, and unable to handle rising runoff.

Different regions of the country exhibit rapid exploitation of natural resources through urban projects. Advanced city planning, along with new sewage systems and water storage management, is fuelling the adoption of stormwater management services in the region.

For instance, in December 2023, the Delhi Jal Board (DJB) and the Municipal Corporation of Delhi (MCD) launched a seven-layer scheme to revive Delhi's stormwater drains. The project was launched to harvest rainwater and contribute to Yamuna rejuvenation in the long run.

Groundwater Depletion Due to Climate Change to Expand Market Expansion

Groundwater recharge and infiltration decreases due to urbanization. Stormwater can be a useful resource for replenishing aquifers and meeting water demands when appropriately managed. Rainfall patterns are changing due to climate change, and extreme precipitation events are occurring more frequently. The hydrologic cycle is accelerated by each 1°C increase in temperature, which causes a 7% rise in atmospheric water vapor. This upgrade is required for stormwater infrastructure to accommodate these changes. The market is moving toward more effective and efficient stormwater management solutions due to the use of cutting-edge technologies and software tools for hydraulic analysis, design, and stormwater modeling, such as StormCAD software.

In December 2023, Bihar Urban Infrastructure Development Corporation Limited (BUIDCO) started the bidding process for the stormwater drainage project in different areas of Patna city. Under this ambitious project, 103 drain networks are being constructed in Patna and neighboring areas of Danapur, Khagaul, and Phulwarsharif to address flooding and waterlogging woes. Forty percent of the project work was completed by December 2023, and the rest is anticipated to be completed by the end of 2024.

Government Regulatory Framework and Municipal Projects to Transform Market Dynamics

The government of India is constantly working to improve runoff water management and flood prevention measures. The master plan for Artificial Recharge to Ground Water-2020 was prepared by the Central Ground Water Board (CGWB) jointly with state governments, including the Government of NCT, Delhi. The master plan includes a macro plan formulated to determine the feasibility of different structures for the nation's varied terrain conditions. The government also unveiled the investment horizon in India's stormwater drainage revolution.

For instance, in May 2024, the UP government signed an MoU with the world-renowned World Resources Institute (WRI) India. The WRI India team will also work with the UP government to develop a stormwater management strategy at the state level. This includes preparing basic data analysis and integrating key development tools such as gap analysis, rainwater-runoff simulation, and flood modelling.

Higher Investment Possibilities and Government Plans to Fuel the Municipal Segment

The municipal corporation carries most of the market depending on the purpose. The government strategies are ready to provide direct capital investments. Municipal corporations, with proficient teams of hydrologists, engineers, and environmental specialists, create comprehensive stormwater management programs for their environs. The construction has moved smoothly since the integration of stormwater master plans and detention systems. The construction and maintenance of stormwater drainage infrastructure lies within the municipal corporations' domain, which involves the construction of primary, secondary, and tertiary drains and renovating already existing stormwater drainage systems.

Future Market Scenario (FY2025-FY2032F)

- Rapid urbanization and infrastructure development are anticipated to increase impervious surfaces. Hence, the government's stringent bodies are expected to build new stormwater management systems.
- Adoption of innovative technologies and poorly designed infrastructure is projected to garner market growth.
- Climate change and extreme weather events push municipal corporations to propel market expansion.
- Implementing principles like stormwater harvesting, infiltration-based solutions, and retention-based systems at site and

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catchment scales.

Key Players Landscape and Outlook

Key players in the Indian stormwater management market consist of a mixture of state-owned and private companies. Major brands focus on government tenders and private-public partnerships. Key market players also deliver custom facilities for operating stormwater management. Furthermore, competitors merge, collaborate, and acquire to enhance their supply chain and expand their service area.

For instance, PRS Geo-Technologies Ltd. delivers Neoloy Geocells solutions that further use water management techniques to localize stormwater control. Cellular confinement Neoloy retains soil structure, can tolerate high sheet flow, and is self-drenching for high soil infiltration.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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