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Evaluating Multi-billion Opportunity in Solid Waste Management in India across Urban Local Bodies and Commercial & Residential Setups

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Abstracts

India is well on its course to achieve its objective of electricity for all, and one can expect the goal to be achieved by 2019 or by 2020. After electricity, water is most important utility service which will need tremendous attention of the government, India is blessed with several rivers but that's under threat due to climate change and India is already declared as water stressed country. After water, waste management will become the most important area for the government, as currently almost all cities are facing enormous challenge in effectively dealing with solid waste management.

With growing population and rapid urbanization, waste generation in India has increased significantly over the last decade. More than 70% of collected urban waste is dumped at landfills. And most of them are brimming. It has also been estimated that annual waste generation will likely increase to 165 million tonnes by 2030. This means that 66,000 hectares of land will be required to set up a landfill site that is 10 meters high and can hold 20 years' worth of waste. To put things in perspective, that is almost 90% of Bengaluru's area. If the current waste management scenario does not improve, one can soon expect to be buried in our own muck. Almost all the Municipalities are struggling to effectively manage waste generated across different cities. MCGM, is staring at brimming landfills, fire related issues in landfills, lack of processing capacities and as a result has resorted to force citizen participation in solid waste management. MCGM, has decided not to pick solid waste for societies / complexes, of more than 20,000 square meters or those producing more than 100kg wet waste per day. The Brihanmumbai Municipal Corporation (BMC) has issued notices to 23,161 housing societies for not following the mandatory rule, leaving citizens in lurch for no mistake of theirs. Had BMC implemented the SWM Rules 2000, by now it would have had effective and efficient solid waste management capabilities in place. Data represented in the

chart below indicates how garbage is overflowing in almost all landfills across the country.

According to data gathered by the Central Pollution Control Board (CPCB), municipal authorities in India had established only 13 waste-to-energy plants, 56 bio-methanation plants, 22 refuse-derived fuel plants and 553 compost and vermicompost plants until 2014. However, more treatment and processing plants need to be built to realize the true potential of solid waste. According to the Planning Commission, municipal solid waste that is not utilized has the potential to produce 439 MW of power from 32,890 tons per day of combustible waste. This includes refuse-derived fuel, 1.3 million cubic meters of biogas per day and 5.4 million metric tonnes of compost (all annual) that can be utilized for agricultural purposes.

InfraInsights sees waste management as a multi-billion dollar opportunity for private sector as the public sector finds itself in spot when it comes to effective waste management. ULBs will seek participation of private sector and its citizens to help deal with the challenge of burgeoning solid waste in almost all cities across the country. It's inevitable that decentralized approach to waste management will lead to capacity creation at community level as well as centralized level in ULBs. Sanitary landfills is no more a viable option for mega cities like Mumbai, Bengaluru, Chennai & others, and hence technology will have to leveraged to effectively and efficiently, reduce, recycle, re-use waste. Demand for semi-automatic or fully automatic composting machine is likely to increase in the residential societies and demand for WTE, Biomethanization, RDF setups are slated to increase across ULBs. Private sector, whether directly or indirectly will play a very important role in partnering with ULBs, Municipalities to shoulder the burden of waste management through technology. InfraInsights research report "Evaluating Multi-billion Opportunity in Solid Waste Management in India across Urban Local Bodies and Commercial & Residential Setups", aims to quantify the business opportunity that waste management as a segment will generate for private sector and companies in the area of public utility services business are expected to immensely benefit out of this demand. Technology providers will see demand from ULBs and Residential societies alike. The report will do a detailed profiling of all the major ULBs in countries to understand its capabilities, gap areas, cost efficiency / inefficiency, budgets, technology deployed, forthcoming project for capacity creation and O&M, to help companies in private sector, draw out its growth strategy in this very critical segment of waste management. Report will be primary research driven, and the analysis and insights will be presented in a manner that it can be leveraged by companies for its business planning in the area of solid waste management.

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