

Municipal Solid Waste in India Market 2018 Global Trend, Segmentation and Opportunities Forecast To 2023

Municipal Solid Waste -Market Demand, Growth, Opportunities and Analysis Of Top Key Player Forecast To 2022

PUNE, MAHARASHTRA, INDIA, April 20, 2018 /EINPresswire.com/ -- [Municipal Solid Waste](#) Industry

Description

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Current Scenario

- Most Indian cities struggle to meet minimum standards for collecting, transporting, treating and disposing of MSW.
- Waste generation far outstrips collection and treatment infrastructure.
- According to the latest available estimates (2017), India generates about 157,478 tonnes of solid waste per day. Against this, it has capacity to treat less than 20% of the waste generated. The remaining 80% is disposed of untreated.
- Segregation at source is non-existent, sorting is manual, coverage is limited, disposal is unscientific, and service backlogs are huge.
- Further, lack of enforcement, limited capacity at the local level, and the absence of a long-term plan have created various challenges in managing solid waste.

Government Initiatives

- The government recognises the need to address the huge gap and is playing its role in this regard. It has allocated about Rs 1 trillion in key programmes including the Atal Mission for Rejuvenation and Urban Transformation (AMRUT) of 500 habitations and the development of 100 smart cities. Another Rs 620 billion has been set aside for the Swachh Bharat Mission.
- Under the Swachh Bharat Mission, a total of Rs 147.86 billion of Gol contribution has been approved for 35 states and union territories. Of this, Rs 74.24 billion (50%) has been allocated for SWM projects in 4,041 towns.
- Under the AMRUT scheme, which aims to improve sanitation and drainage services in urban areas, a total of 574 septage management and sewerage projects involving an investment of Rs 205 billion have been approved by the government
- Further, a total of 60 cities have been shortlisted for development under the Smart Cities Mission. A total investment of about Rs 40.14 billion will be made under the Smart Cities Mission towards SWM projects.

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Private sector participation

- Over the last few years, the scope for PPPs in MSW management has expanded.
- Different models with different approaches for the assessment of risks and responsibilities of stakeholders are being adopted.
- Cities such as Mumbai, Surat, Faridabad, Agra and Dhanbad have entered into arrangements with private players.
- The MSW sector has a portfolio of 33 key PPP projects involving a combined investment of about Rs 60 billion.
- In terms of investment, 40% of the projects have been completed, 7% are at various stages of implementation, 42% have been recently awarded, 9% are proposed/planned to be taken up in the future and the remaining 2% have been stalled.

Reduce, recycle and reuse of solid waste

- The concept of recycle and reuse of wastewater has gained significant interest in the country.
- Municipal corporations are opening up to the idea of deploying advanced technologies to treat solid waste, as well as recycle and reuse it.
- Mumbai, Pammal and Koyambedu have adopted decentralised SWM systems that help reduce the quantity of waste disposed of at dump sites by adopting practices of recycling and waste processing by composting, bio-methanation, etc.

Waste to energy

- As of November 2016, 33 WtE plants with a cumulative installed capacity of 275 MW were operational in the country. The state of Andhra Pradesh has the largest installed capacity of WtE plants at 74 MW (27%).
- There is tremendous potential for producing energy from municipal solid waste. As per MNRE, the WtE potential across 35 states and union territories stands at 1,532 MW.
- The top five states in terms of potential for energy recovery from MSW are Maharashtra, Uttar Pradesh, Tamil Nadu, West Bengal, and Delhi

Opportunities galore

- The MSW sector in India is all set to grow, driven by the government's ambitious programmes to develop and upgrade SWM infrastructure in all cities.
- India Infrastructure Research estimates that 27 MSW projects, involving an investment of over Rs 45 billion, are under implementation or are planned to be taken up in the future.
- Around 15,180 tpd of solid waste treatment capacity will be added by these projects.
- Among states, Maharashtra will offer the maximum opportunity both in terms of investment and capacity addition.
- With a strong pipeline of projects, the MSW sector offers several business opportunities across different segments – contractors, consultants, equipment and technology suppliers, material suppliers and other ancillary market segments

Issues and the Way Forward

- Overall, the MSW sector has a promising outlook and offers huge opportunities for all stakeholders over the next few years. A large number of solid waste projects have been approved and many more are on the cards.
- ULBs need to step up their efforts to effectively develop and manage solid waste infrastructure.
- There is renewed focus on recycling and reuse of waste. A number of waste-to-energy initiatives have also been taken and decentralised systems are being explored.

- Going forward, both stand-alone and integrated solid waste projects will be undertaken. The services will expand to newer and smaller urban centres.
- Innovation in technology and deployment of advanced treatment solutions need to be explored.
- A stricter regulatory framework and timely execution of projects will be crucial to future growth.
- Clear project structuring with an appropriate risk sharing mechanism and identified cost recovery sources will be the key.

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The report is divided into five sections with fifteen chapters (in addition to executive summary):

Section I: Market Overview

- Size and Growth
- Recent Initiatives and Key Developments
- Inter-City Comparison: Key Cities
- Economics and Financing

Section II: Project, Outlook and Opportunities

- Projects, Outlook and Opportunities
- PPP Projects and Outlook
- Outlook and Opportunities (till 2022-23)

Section III: Review of Government Programmes

- Swachh Bharat Mission
- Atal Mission for Rejuvenation and Transformation (AMRUT)
- Smart Cities Mission

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