

ANMD-MRS34-334 · Sustainable Tourism Technologies

Waste and Water Monitoring Tools

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Waste and water monitoring tools combine water-use monitoring, waste-tracking systems and leak-detection technology to measure and cut resource consumption and loss across hotels, resorts, eco-lodges and attractions. By exposing usage, leaks and waste streams in real time, they turn tourism's hidden resource footprint into managed, reportable performance. This report is a comprehensive, decision-grade study of that market across system type, waste-tracking type, application, end user, business model and deployment scale.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

The sustainability case is the report's backbone. Beyond cost, waste and water monitoring delivers measurable water savings, waste diversion and verified resource performance, strengthening the responsible-hospitality story.

Mapped Sustainable Development Goals:

SDG 6 Clean Water	SDG 12 Responsible Consumption	SDG 11 Sustainable Cities
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Measurable sustainability outcomes assessed:

- Reduced water consumption and leak loss
- Quantified waste streams and diversion
- Resource-efficient hospitality operation
- Sensor coverage and data integrity as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	3 SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. Near-term value concentrates in Europe (Spain, Germany, France); Asia Pacific (Maldives, Thailand, Australia); North America (United States, Canada), while Latin America, Africa and the Middle East are assessed on their own merits rather than aggregated into Rest of World.

MARKET OVERVIEW

Waste and water monitoring is moving from utility meters to real-time, analytics-driven resource management.

Waste and water monitoring is moving from utility meters to real-time, analytics-driven resource management. Demand is driven by water-scarcity exposure, waste-reduction mandates and hospitality ESG reporting. The market is read two ways — value and units (deployments / sites monitored), with sites-monitored coverage as a maturity lens — forecast under conservative, base, accelerated and disruption scenarios, every projection resolved to the 2025 base year and each region reported separately rather than folded into Rest of World.

- Europe leads resource reporting, anchored by water-efficiency rules, waste directives and eco-certification demand.
- Asia Pacific is the growth engine, as water-stressed resort destinations adopt monitoring under tourism expansion.
- North America scales on cost and ESG, where hotel-group water-and-waste targets drive deployment.
- System and application segment the value, across water monitoring, waste tracking and leak detection, and across hotels, lodges and attractions.

REGIONAL OUTLOOK

Across the seven reporting regions, the report separates deployment leaders from high-growth and emerging markets, profiling named country sub-markets, policy regimes and project pipelines in each. Latin America, Africa and the Middle East are assessed on their own merits — never aggregated into Rest of World — and every forecast resolves to the 2025 base year.

Region	Stage	Lead Markets & Drivers
Europe	Reporting leader	Spain, Germany, France — water-efficiency rules, waste directives, certification
Asia Pacific	Growth engine	Maldives, Thailand, Australia — water-stressed resorts, expansion
North America	Cost-and-ESG	United States, Canada — hotel-group water-and-waste targets
Latin America	Emerging	Costa Rica, Mexico — eco-resort resource monitoring
Africa	Frontier	Kenya, South Africa — safari-lodge water and waste
Middle East	Frontier	UAE, Saudi Arabia — water-scarce luxury hospitality

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • Water-scarcity & cost exposure • Waste-reduction & diversion mandates • Hospitality ESG & eco-certification • Leak-loss & operating-cost savings • IoT-metering & analytics maturity 	<ul style="list-style-type: none"> • Retrofit metering & sensor cost • Integration across mixed estates • Data-quality & baseline establishment • Remote-site connectivity • Sustained engagement beyond install

SEGMENTATION SNAPSHOT

By System Type	Water-use monitoring · waste-tracking systems · leak-detection tools
By Waste Tracking	Bin-level sensing · weighing · stream-segregation · analytics
By Application	Hotels & resorts · eco-lodges · attractions
By End User	Hospitality operators · facility managers · destinations · sustainability teams
By Business Model	Equipment purchase · SaaS · managed-service · outcome-based
By Deployment Scale	Single-property · portfolio · destination-wide

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Waste and Water Monitoring Tools
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
- › Chapter 15. Latin America Market Intelligence
- › Chapter 16. Africa Market Intelligence
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- › Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans water and waste-monitoring vendors, platform specialists and integrated system providers.

Representative players profiled in the full report:

Xylem Inc. · Grundfos Holding A/S · Kamstrup A/S · Schneider Electric SE · Badger Meter · Inc. · Itron (USA) · Banyan Water (USA) · WINT (Israel) · Smartvatten (Finland) · Hydrao (France) · and 25+ further profiled players across the value chain.

Investment intelligence: venture, infrastructure, growth, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and investment readiness verdict.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global waste and water monitoring tools market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do the category economics change returns versus incumbent alternatives?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › Triangulated sizing — every market read three ways so value, volume and the report's physical unit reconcile rather than conflict.
- › Region-honest forecasting — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › Integrated evidence base — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › No-fabrication discipline — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › Anti-greenwashing rigour — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › Decision-first structure — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, neutral investment-readiness verdict.

WHO SHOULD BUY THIS REPORT

Investors, water & waste-tech vendors, hospitality operators, facility managers, destinations, sustainability teams, lenders, strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.