

# **Water ReUse**

## **The 21<sup>st</sup> Century Opportunity**

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Water Rights Tear at an  
Indian Reservation - NY  
Times 4/22/13

“Water is the oil of the  
21st century.”

*Andrew Liveris, CEO Dow*

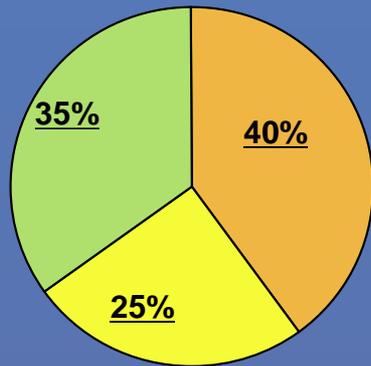
Texas files water lawsuit  
against N.M. - Jan 2013

*Chemical*

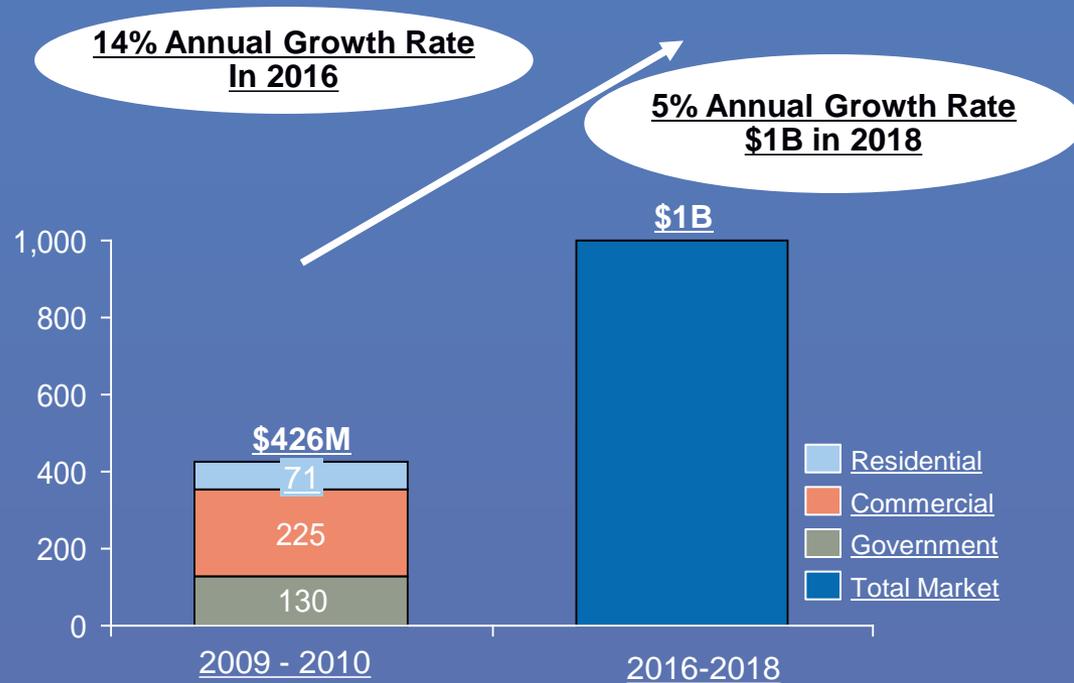
# U.S. rainwater market to exceed \$1 billion

## U.S. Market

100% = \$426 Million Revenue, 2009

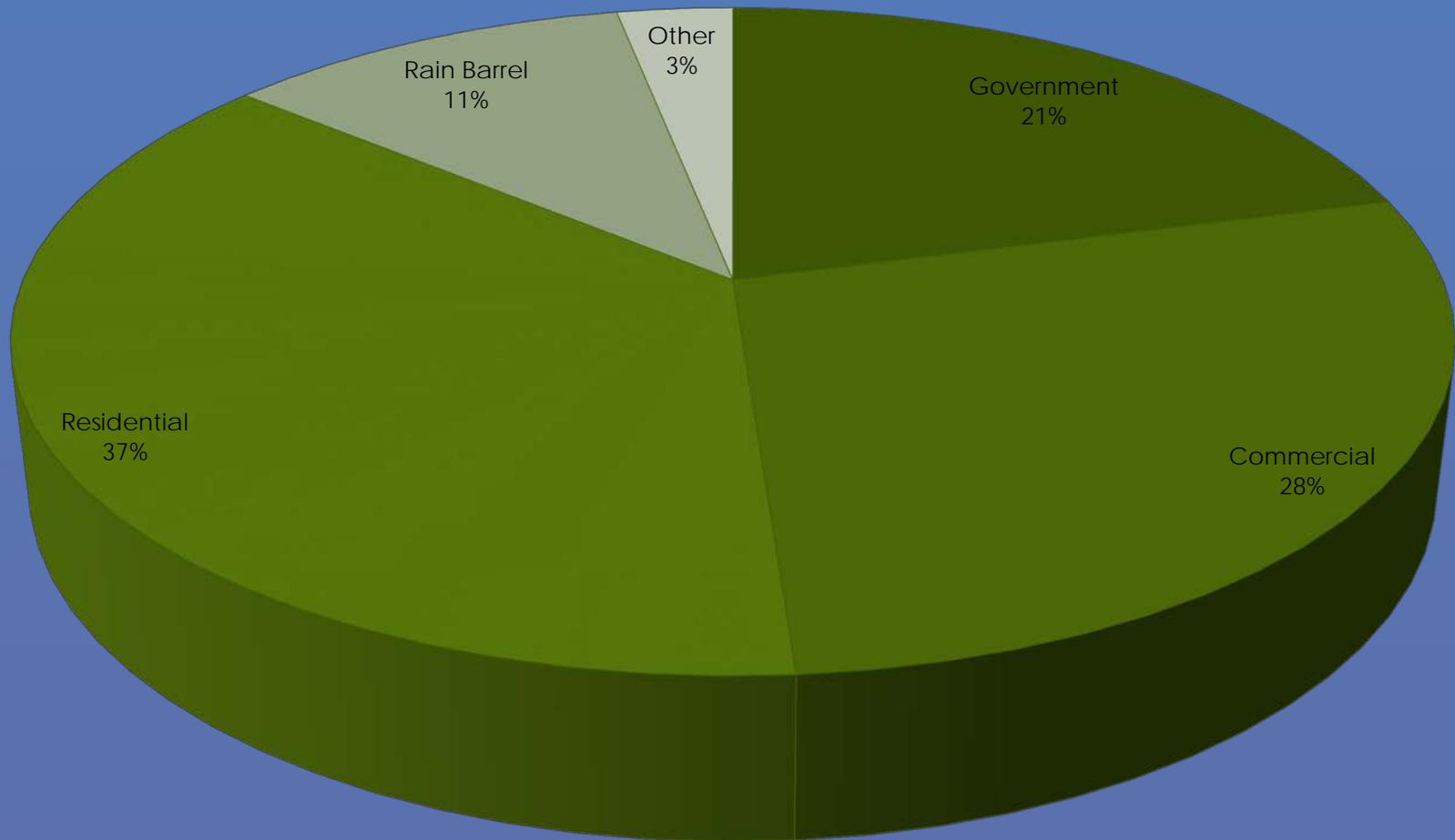


- Tanks
- Labor
- Accessories



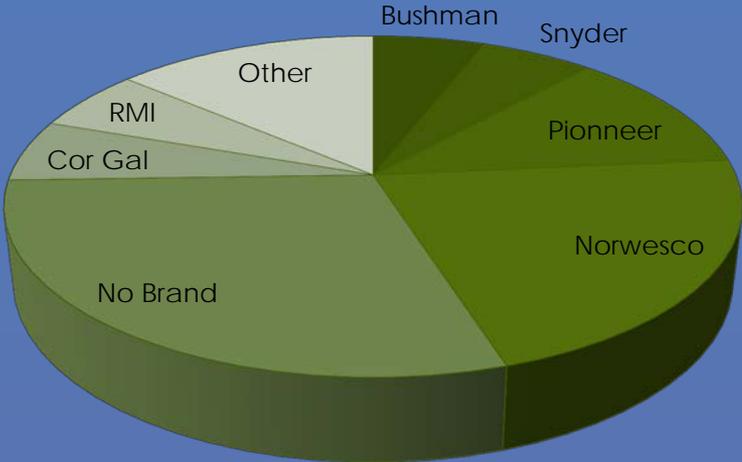
Source: U.S. Rainwater Industry Analysis

# Split Between Residential and Commercial



# Products Favored by Installers

## Above Ground Brands



## Filtration Brands



# Distribution of Market

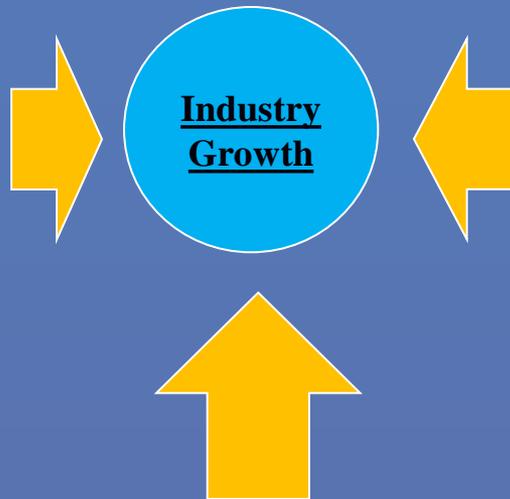
State	Number of Businesses	% of Total
Texas	208	18.86%
California	158	14.32%
New Mexico	79	7.16%
Georgia	75	6.80%
Arizona	61	5.53%
Washington	60	5.44%
North Carolina	43	3.90%
Hawaii	38	3.45%
Florida	35	3.17%
Oregon	30	2.72%
Illinois	29	2.63%
Ohio	20	1.81%
Virginia	20	1.81%

Regulations, drought and lack of or too much water  
(most of the time) drive interest

# Drivers of industry growth

## Supply side growth

- Improving reliability of solutions
- New technologies and product offerings
- Existing industry value chain
- Plumbing code updates



## Demand side growth

- Increasing water costs
- Water scarcity
- Desire to conserve
- Growing awareness of rainwater solutions
- Incentives
- Sustainability movement

## Growth Inhibitors

- |   |  |
|---|--|
| <ul style="list-style-type: none"><li>• <b>Economy</b></li><li>• <b>Rainwater is not part of discussion!</b></li><li>• <b>Scant Federal or State support</b></li><li>• <b>No industry standards</b></li></ul> | <ul style="list-style-type: none"><li>• <b>State-by-State “opinions”</b></li><li>• <b>RWH regs often more stringent than well water</b></li><li>• <b>A lot of foreign products</b></li></ul> |
|---|--|

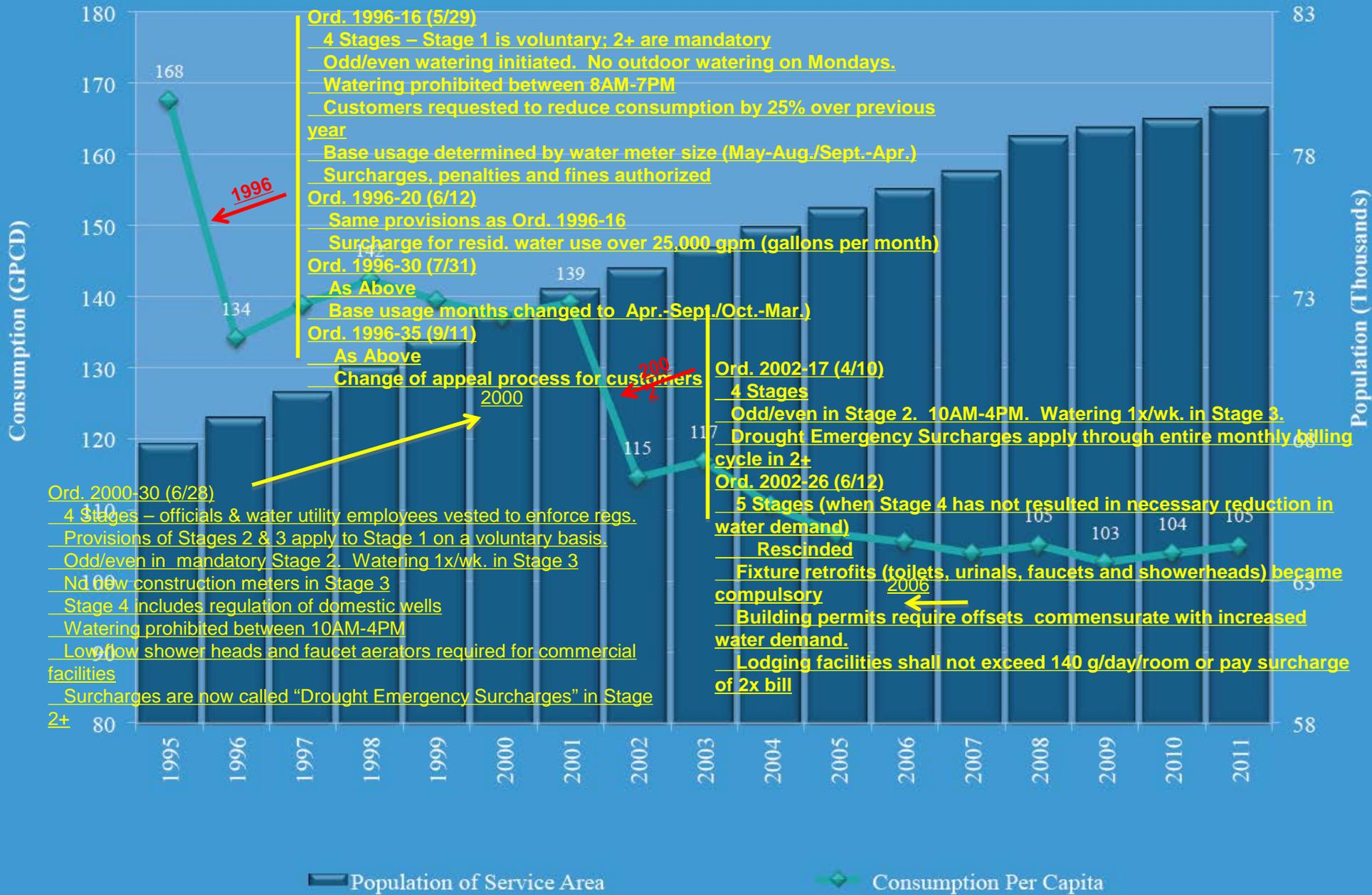
# Examples – How many Guides Do we Really, Really Need

- **ASPE Guidelines**
- **EPA Municipal Handbook  
Rainwater Harvesting Policies**
- **Texas Rainwater Harvesting Guide**
- **Guidelines on Rainwater Catchment  
Systems for Hawaii**
- **Rainwater Harvesting in San  
Francisco**
- **Georgia Rainwater Harvesting  
Guidelines**
- **Virginia Design Specification No. 6:  
Rainwater Harvesting**
- **Virginia Rainwater Harvesting  
Manual, 2nd Edition**

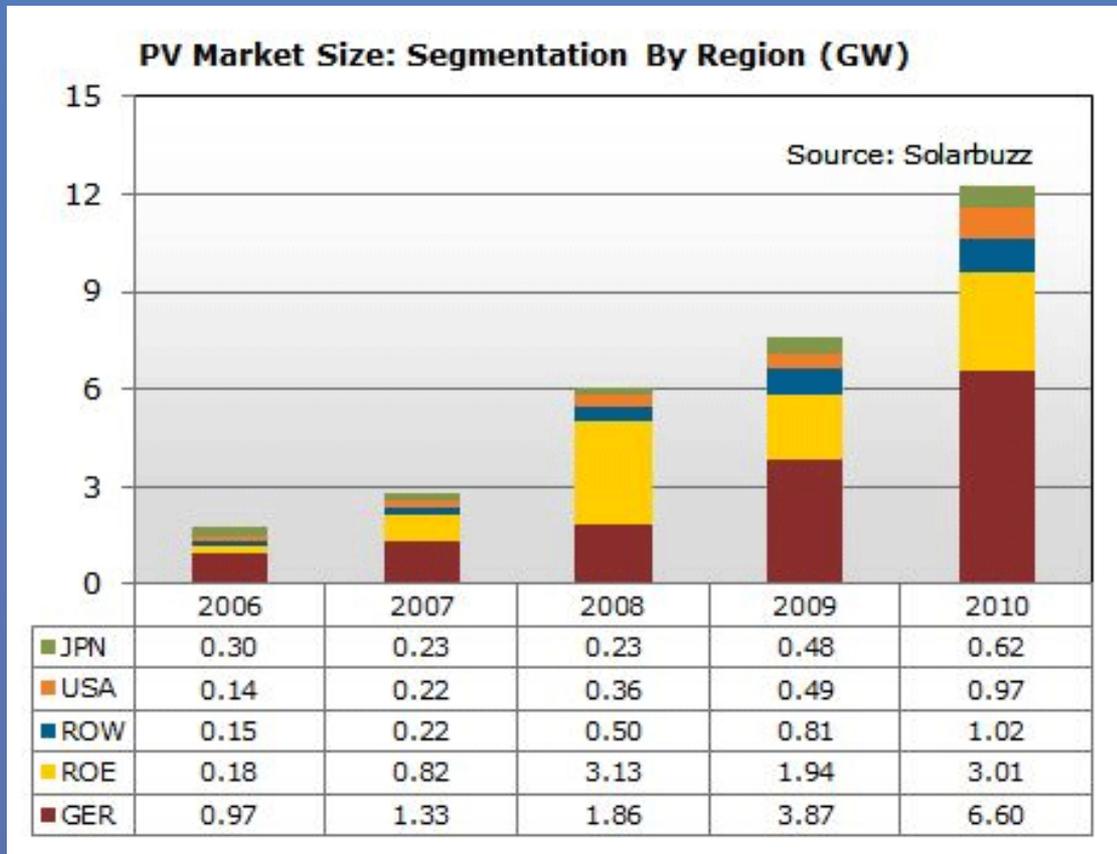
- **Arizona Rainwater Harvesting  
Guidance Manual**
- **Los Angeles City Low Impact  
Development Ordinance**
- **U of FL Cisterns To Collect Non-  
Potable Water For Domestic Use  
Guidelines**
- **New Mexico Rainwater Harvesting  
Manual**
- **Oregon Smart Guide - Rainwater  
Harvesting**

>> The list goes on and on....

# Examples – Regulations Do Work



# Examples – Incentives Do Work



- Solar industry benefiting from great incentives
- Higher incentive in some areas than others
- Even within States it is all over the board – NM

**Works for solar,  
why not water?**

# What To Do????

- **Zero runoff** from Fed Bldg – Lead by Example
- Fund equivalent of **Database of State Incentives for Renewables and Efficiency** (Dept of Energy)
- **Sample guides** that could be copied by States and counties (i.e. irrigation, toilet flushing, drinking systems)
- Rationalize **water quality standards** (e.g. why can untested well water be used in a toilet and not rainwater. We have naturally occurring arsenic and uranium in NM wells)
- **Grants** to research/build US products. Most imported from Germany, UK and Australia

# Summary

- Rainwater needs to be part of the solution, not a problem (i.e. Stormwater)
- Rainwater market is growing but very, very fragmented
- Regulations and incentives vary greatly from state-to-state and even within states
- Many, many things can be done
- Start the discussions now! Action to Follow