

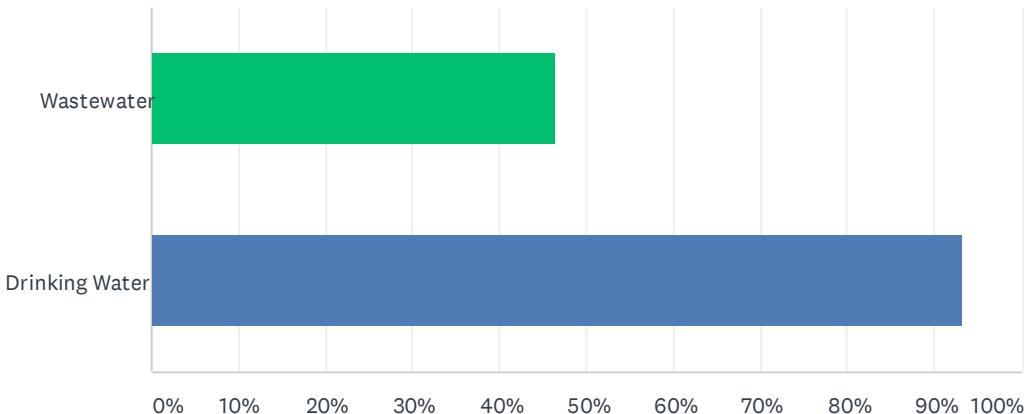


Supply Chain Survey
September 2021

In light of the recent supply chain challenges faced by water and wastewater utilities, the NRWA Regulatory Committee requested that a survey be conducted. A six question survey was developed and distributed to NRWA State Associations during the month of September. The following information was developed from this survey. NRWA received 888 responses from 23 states.

Q2 What is your facility type?(Select all that apply.)

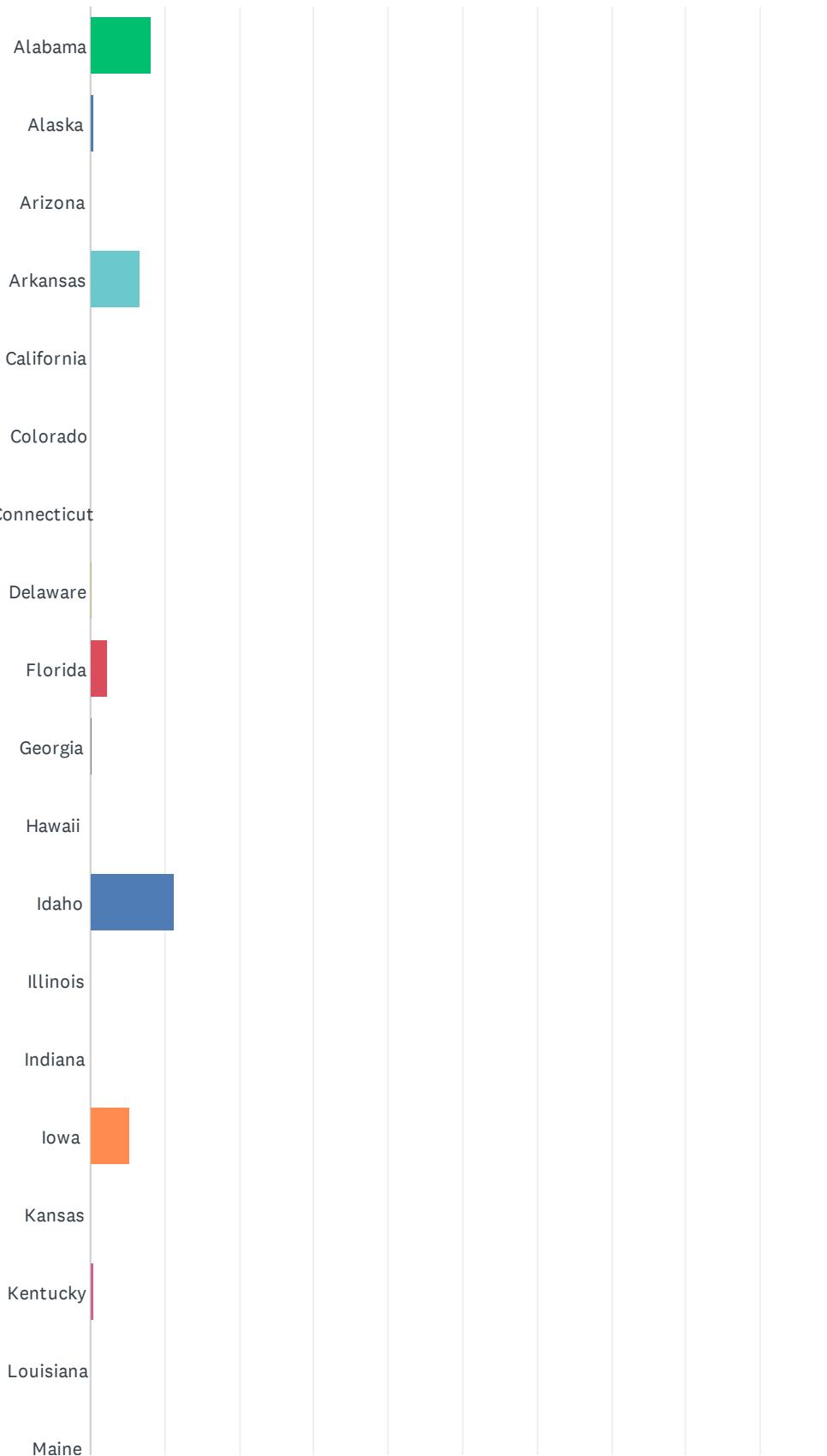
Answered: 867 Skipped: 0



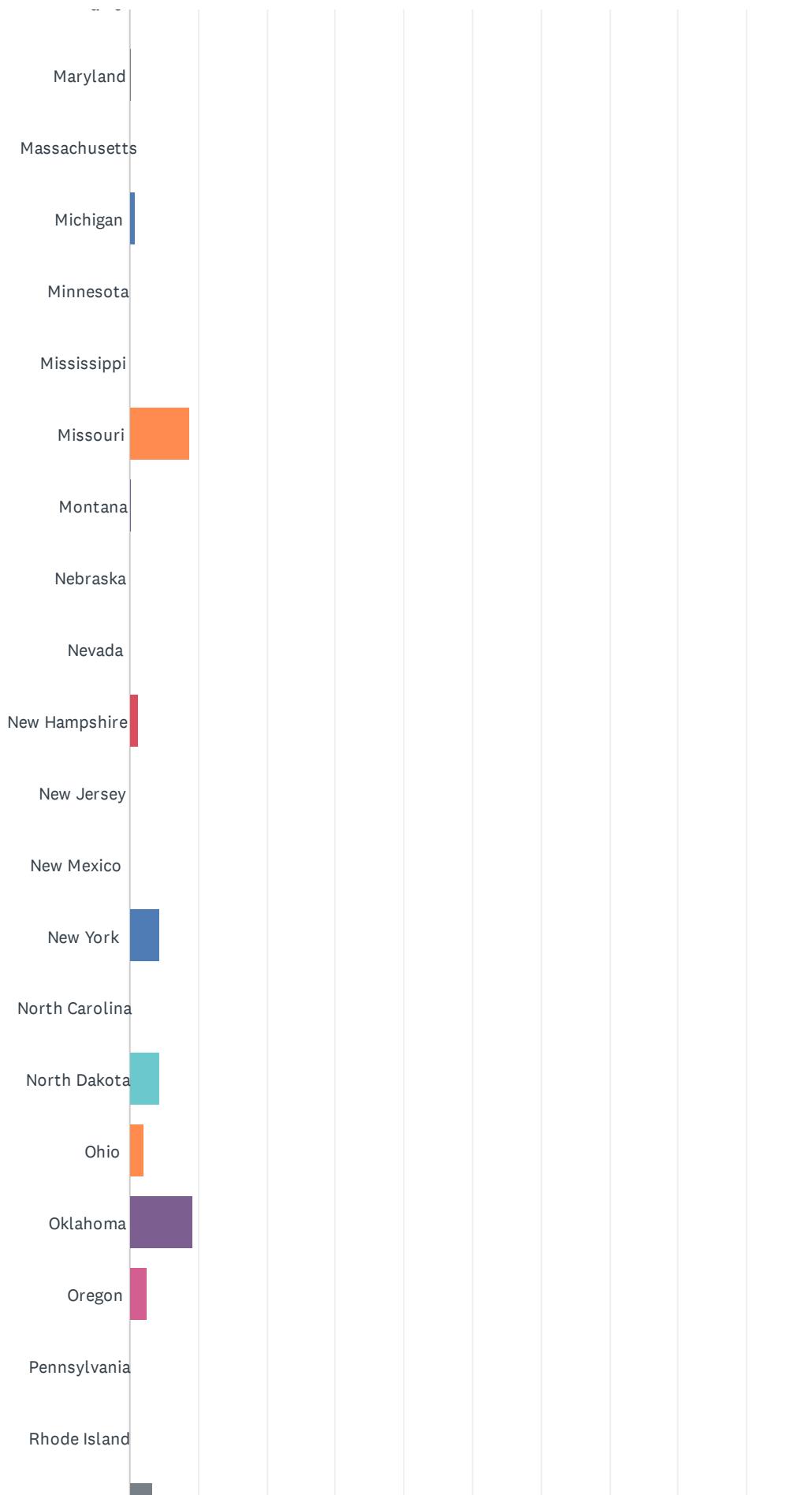
ANSWER CHOICES	RESPONSES
Wastewater	46.48%
Drinking Water	93.31%
Total Respondents: 867	

Q3 Where is your utility located (state):

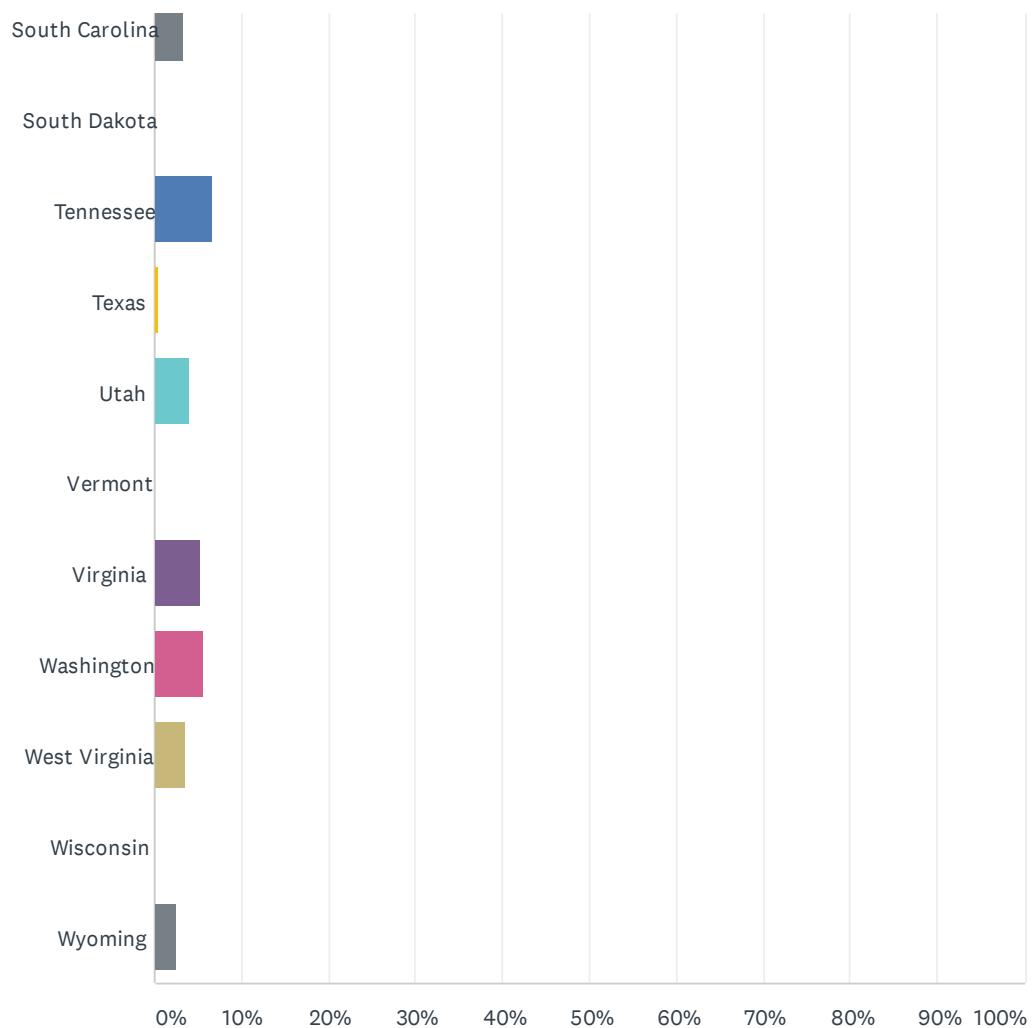
Answered: 864 Skipped: 3



Rural Water Supply Chain Survey



Rural Water Supply Chain Survey



Rural Water Supply Chain Survey

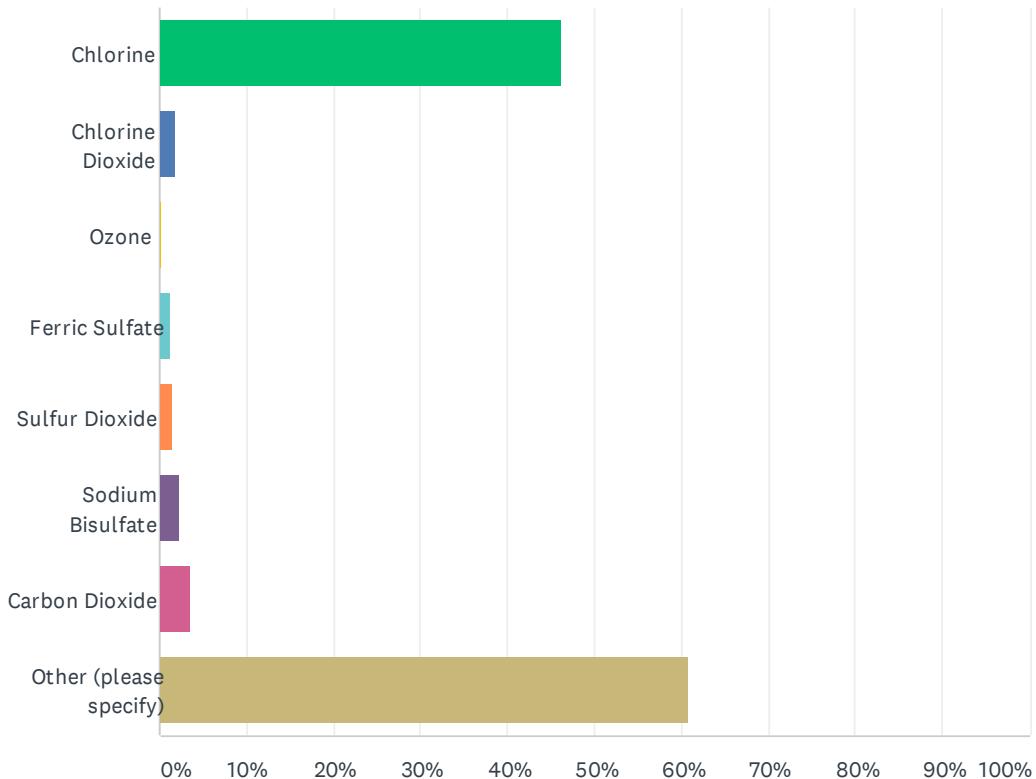
ANSWER CHOICES	RESPONSES
Alabama	8.22% 71
Alaska	0.46% 4
Arizona	0.00% 0
Arkansas	6.71% 58
California	0.00% 0
Colorado	0.00% 0
Connecticut	0.00% 0
Delaware	0.12% 1
Florida	2.20% 19
Georgia	0.12% 1
Hawaii	0.00% 0
Idaho	11.34% 98
Illinois	0.00% 0
Indiana	0.00% 0
Iowa	5.32% 46
Kansas	0.00% 0
Kentucky	0.35% 3
Louisiana	0.00% 0
Maine	0.00% 0
Maryland	0.12% 1
Massachusetts	0.00% 0
Michigan	0.93% 8
Minnesota	0.00% 0
Mississippi	0.00% 0
Missouri	8.80% 76
Montana	0.12% 1
Nebraska	0.00% 0
Nevada	0.00% 0
New Hampshire	1.16% 10
New Jersey	0.00% 0
New Mexico	0.00% 0
New York	4.40% 38

Rural Water Supply Chain Survey

North Carolina	0.00%	0
North Dakota	4.40%	38
Ohio	2.08%	18
Oklahoma	9.14%	79
Oregon	2.43%	21
Pennsylvania	0.00%	0
Rhode Island	0.00%	0
South Carolina	3.36%	29
South Dakota	0.00%	0
Tennessee	6.71%	58
Texas	0.46%	4
Utah	4.05%	35
Vermont	0.00%	0
Virginia	5.32%	46
Washington	5.67%	49
West Virginia	3.59%	31
Wisconsin	0.00%	0
Wyoming	2.43%	21
TOTAL		864

Q4 Is your utility experiencing challenges securing treatment chemicals? (Check all that apply)

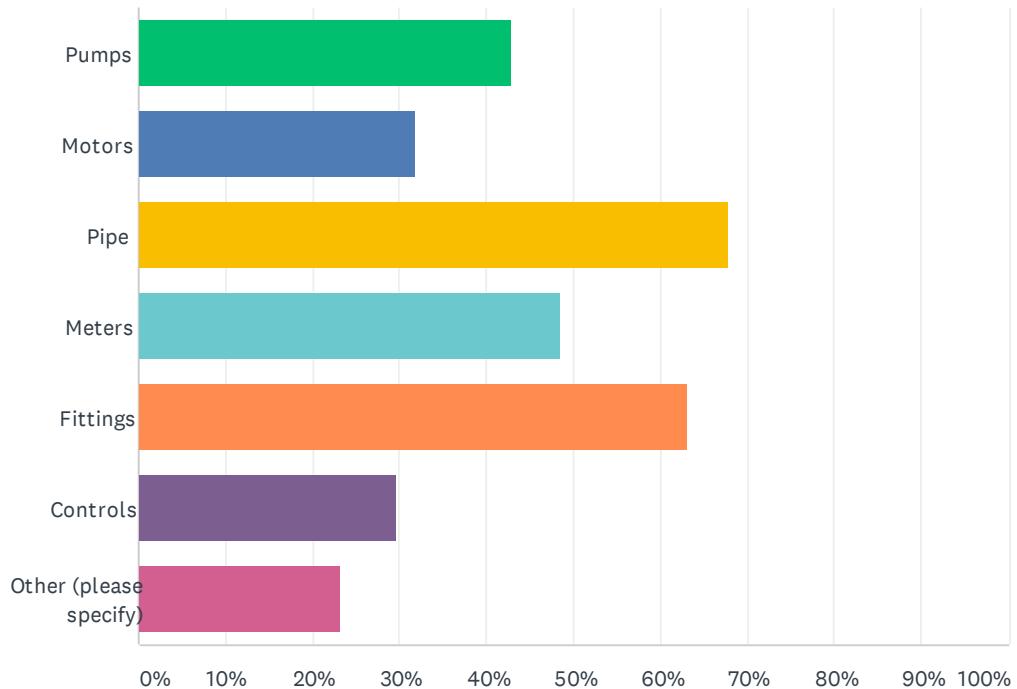
Answered: 431 Skipped: 436



ANSWER CHOICES	RESPONSES
Chlorine	46.17% 199
Chlorine Dioxide	1.86% 8
Ozone	0.23% 1
Ferric Sulfate	1.16% 5
Sulfur Dioxide	1.39% 6
Sodium Bisulfate	2.32% 10
Carbon Dioxide	3.48% 15
Other (please specify)	60.79% 262
Total Respondents: 431	

Q5 Are you experiencing shortages or significant price increases for any of the following?(Check all that apply)

Answered: 722 Skipped: 145



ANSWER CHOICES	RESPONSES
Pumps	42.94% 310
Motors	31.72% 229
Pipe	67.73% 489
Meters	48.48% 350
Fittings	63.16% 456
Controls	29.64% 214
Other (please specify)	23.27% 168
Total Respondents: 722	

Q6 Are there any other supply chain concerns that you would like to share?

Answered: 319 Skipped: 548

Are there any other supply chain concerns that you would like to share?
"Just in Time Delivery" is not working. The supply chain, and Manufacturers are working as fast as possible. Suppliers are taxed on material on hand, so there is no incentive to build stock in case of surges in demand as we now are experiencing. Work to lessen taxes on suppliers stocking material/ parts, giving them the ability to do so again.
16 week delivery time for some equipment. No One seems to carry inventory. All capital projects have to allow an additional year for delivery or the bidder includes a delivery "incentive" charge
Almost everything we need to do business is on a 4 to 6 week backorder and the cost has gone up significantly.
Although available, some price increases, and extended delivery times
At this time the primary issue I am aware of so far as it relates to the water treatment side of things in our system is small increases in the price of chlorine products and somewhat more aggressive increases in the cost of products that contain aluminum compounds (i.e. the polymer that our WTP uses for coagulation).
At this time we are good. Just waiting for some control parts for a new booster station
Availability
Availability and lead time for parts and materials. We cannot bid a low pressure sewer expansion because of increased costs and issues with availability of HDPE pipe.
Availability and price are our two biggest supply chain issues at this time. Chlorine, other than seeing price increases, hasn't been the same issue as components.
Availability of electrical generators to satisfy Texas emergency preparedness law.
Being a small entity & not requiring large amounts of materials makes it even harder to purchase items recently.
Being able to get the supplies.
Being able to meet demands for services with on-going development projects. Deliveries delayed due to lack of truck drivers.
Building material, paint
Chemical suppliers are days late or not showing up at all for scheduled shipments.
Chlorine Gas shortage
Chlorine is in short supply and I heard so from several systems. I recently (September) had to deliver polymer to a system that had run out due to shipping issues. This posed a near water shortage issue
CO2 issues with supply. Seems to be we are competing more now with marijuana growers affecting availability of product.
Companies taking extended periods to return calls
Concern about quality and availability through 2021 and all of 2022. Have had CO2 shortages in the past and neighboring WTP's with chlorine issues.
Copper prices are up
Cost increases for chemicals (force majeure)