

Water and Wastewater Treatment Equipment Market by Product Type (Filtration, Disinfection, Desalination, Sludge Treatment, Biological), Process (Primary, Secondary And Tertiary), End-User (Municipal, Industrial), And Region -Global Forecast to 2029

Market Report | 2024-04-09 | 257 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The Water & wastewater treatment equipment Market is projected to reach USD 87.7 billion by 2029, at a CAGR of 5.0% from USD 68.7 billion in 2024. Municipalities hold the largest market share as end-users in the water and wastewater treatment equipment industry. Firstly, the increasing urbanization and population growth worldwide have led to higher demand for clean water supply and effective wastewater treatment in urban areas. Municipalities are responsible for providing safe drinking water to residents and treating wastewater to protect public health and the environment.

Additionally, stringent regulations and standards imposed by governmental bodies require municipalities to invest in advanced water and wastewater treatment infrastructure to comply with quality and discharge standards. These regulations often mandate municipalities to upgrade existing treatment facilities or build new ones to meet growing population needs and environmental concerns.

Moreover, the aging infrastructure in many urban areas necessitates significant investments in water and wastewater treatment systems for rehabilitation and modernization. Municipalities must replace outdated equipment and adopt innovative technologies to improve treatment efficiency, reduce operational costs, and enhance overall system performance.

Furthermore, the increasing prevalence of waterborne diseases and contamination incidents emphasizes the importance of robust water treatment systems in municipal settings. To safeguard public health and mitigate the risks associated with waterborne pathogens and pollutants, municipalities prioritize investments in reliable and efficient water and wastewater treatment equipment.

Lastly, the growing awareness among policymakers and the public about the importance of sustainable water management

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

practices drives municipalities to invest in eco-friendly treatment solutions that minimize environmental impact and promote resource conservation. As a result, the municipal sector remains the largest market segment for water and wastewater treatment equipment, driving continuous innovation and growth in the industry.

"Disinfection, by product type, accounts for the second-largest market share in 2023."

Disinfection by product type holds the second-largest share in the water and wastewater treatment equipment market. Firstly, disinfection is a critical step in water treatment processes to eliminate harmful pathogens, bacteria, and viruses, ensuring that water is safe for consumption and meets regulatory standards. As a result, there is a constant demand for disinfection equipment and technologies across various end-user sectors, including municipal water treatment plants, industrial facilities, and commercial establishments.

Moreover, the increasing emphasis on water quality and public health safety drives the adoption of advanced disinfection methods and technologies. Concerns about waterborne diseases and microbial contaminants in drinking water sources necessitate the implementation of effective disinfection solutions to prevent outbreaks and ensure the delivery of clean, potable water to consumers.

Furthermore, the emergence of new disinfection technologies, such as ultraviolet (UV) disinfection, ozone treatment, and advanced oxidation processes, offers more efficient and environmentally friendly alternatives to traditional disinfection methods like chlorination. These innovative disinfection technologies provide superior disinfection efficacy, reduced chemical usage, and fewer disinfection by-products (DBPs), addressing concerns about the potential health and environmental impacts associated with conventional disinfection practices.

"Tertiary is expected to be the fastest growing process segment at CAGR 5.3% for water & wastewater treatment equipment market during the forecast period, in terms of value."

Tertiary treatment processes are experiencing rapid growth in the water and wastewater treatment equipment market due to several key factors. Firstly, tertiary treatment plays a crucial role in achieving stringent water quality standards and regulatory compliance by addressing specific contaminants that may remain after primary and secondary treatment processes. As environmental regulations become more stringent worldwide, there is a growing emphasis on the removal of nutrients, pathogens, and emerging contaminants from wastewater effluents before discharge into receiving water bodies.

Moreover, increasing urbanization, industrialization, and population growth are leading to higher volumes of wastewater generation, placing greater pressure on existing treatment infrastructure. Tertiary treatment processes, such as filtration, disinfection, and advanced oxidation, offer effective solutions for treating complex wastewater streams and meeting the rising demand for clean water resources.

Furthermore, growing awareness of water scarcity and the need for water reuse and recycling initiatives drive the adoption of tertiary treatment processes in water-stressed regions. Tertiary treated wastewater can be reclaimed for various non-potable applications such as irrigation, industrial processes, and groundwater recharge, reducing the strain on freshwater resources and enhancing sustainability.

Additionally, the increasing investment in wastewater infrastructure upgrades and modernization projects, particularly in developing economies, fuels the demand for tertiary treatment equipment and systems. Governments, municipalities, and industrial facilities are investing in advanced tertiary treatment technologies to improve water quality, protect ecosystems, and support sustainable development goals.

"Based on region, North America was the second largest market for water & wastewater treatment equipment market in 2023."

North America occupies a significant position as the second-largest region in the water and wastewater treatment equipment market due to several key factors. Firstly, stringent regulatory standards enforced by agencies such as the Environmental Protection Agency (EPA) drive the demand for advanced treatment solutions to ensure compliance with water quality regulations. The Clean Water Act and Safe Drinking Water Act mandate the treatment of wastewater and drinking water to safeguard public health and the environment, leading to substantial investments in water infrastructure and treatment technologies.

Moreover, North America's aging water and wastewater infrastructure presents challenges related to water quality, supply, and

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

reliability. As existing treatment plants reach the end of their service life and population growth strains existing resources, there is a pressing need for infrastructure upgrades and modernization projects. This creates opportunities for the adoption of advanced treatment equipment and systems to enhance the efficiency and resilience of water treatment processes. Additionally, increasing industrialization and urbanization in North America result in higher volumes of wastewater generation from various sectors, including manufacturing, energy production, and municipal sources. This drives the demand for wastewater treatment equipment capable of addressing diverse contaminants and pollutants present in industrial effluents. Furthermore, growing concerns about emerging contaminants, such as pharmaceuticals, microplastics, and industrial chemicals, amplify the need for advanced treatment technologies capable of removing these substances from water and wastewater streams. Innovative solutions such as membrane filtration, advanced oxidation processes, and UV disinfection systems are increasingly deployed to address these emerging challenges.

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees is as follows:

- By Company Type: Tier 1 - 40%, Tier 2 -30%, and Tier 3 - 30%

- By Designation: C-Level - 20%, Director Level - 10%, and Others - 70%

- By Region: North America - 20%, Europe -30%, Asia Pacific - 30%, Middle East & Africa - 10%, and South America- 10%

The key players in this market are Veolia (France), Xylem (US), Ecolab (US), DuPont (US), Pentair (UK), 3M (US), Aquatech International (US), Thermax Limited (India), Culligan Water (US), Calgon Carbon Corporation (US) etc.

Research Coverage

This report segments the market for the water and wastewater treatment equipment market on the basis of product type, process, end-user and region. It provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, new product launches, expansions, and mergers & acquisitions associated with the market for the water & wastewater treatment equipment market.

Key benefits of buying this report

This research report is focused on various levels of analysis □ industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the water and wastewater treatment equipment market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

- Analysis of key drivers: The market growth is driven by increasing water scarcity concerns which in turn drives the adoption of sustainable water management practices. The increase in industrial water consumption and discharge and growing global population along with rising industrialization and urbanization.

- Market Penetration: Comprehensive information on the water and wastewater treatment equipment market offered by top players in the global water and wastewater treatment equipment market.

- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the water and wastewater treatment equipment market.

- Market Development: Comprehensive information about lucrative emerging markets □ the report analyzes the markets for the water and wastewater treatment equipment market across regions.

- Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global water and wastewater treatment equipment market.

- Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the water and wastewater treatment equipment market.

Table of Contents:

1□INTRODUCTION□35

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1.1STUDY OBJECTIVES35

1.2MARKET DEFINITION35

1.3INCLUSIONS & EXCLUSIONS36

1.4MARKET SCOPE36

FIGURE 1WATER & WASTEWATER TREATMENT EQUIPMENT MARKET SEGMENTATION36

1.4.1REGIONS COVERED37

1.4.2YEARS CONSIDERED37

1.5CURRENCY CONSIDERED37

1.6UNITS CONSIDERED38

1.7LIMITATIONS38

1.8STAKEHOLDERS38

1.9SUMMARY OF CHANGES38

2RESEARCH METHODOLOGY40

2.1RESEARCH DATA40

FIGURE 2WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET: RESEARCH DESIGN40

2.1.1SECONDARY DATA41

2.1.1.1Key data from secondary sources41

2.1.2PRIMARY DATA41

2.1.2.1Primary data sources42

2.1.2.2Key water and wastewater treatment equipment manufacturers42

2.1.2.3Breakdown of interviews with experts42

2.1.2.4Key industry insights43

2.2BASE NUMBER CALCULATION43

2.2.1APPROACH 1: SUPPLY-SIDE ANALYSIS43

2.2.2APPROACH 2: DEMAND-SIDE ANALYSIS43

2.3FORECAST NUMBER CALCULATION44

2.3.1SUPPLY SIDE44

2.3.2DEMAND SIDE44

2.4MARKET SIZE ESTIMATION44

FIGURE 3MARKET SIZE ESTIMATION METHODOLOGY: REVENUE OF MARKET PLAYERS44

2.4.1BOTTOM-UP APPROACH45

2.4.2TOP-DOWN APPROACH45

2.5DATA TRIANGULATION46

FIGURE 4WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET: DATA TRIANGULATION46

2.6ASSUMPTIONS47

2.7RECESSION IMPACT47

2.8GROWTH FORECAST48

2.9RISK ASSESSMENT48

3EXECUTIVE SUMMARY49

FIGURE 5FILTRATION SEGMENT TO DOMINATE MARKET BETWEEN 2024 AND 202949

FIGURE 6TERTIARY SEGMENT TO LEAD MARKET BETWEEN 2024 AND 202950

FIGURE 7MUNICIPAL END USER TO LEAD MARKET BETWEEN 2024 AND 203051

FIGURE 8ASIA PACIFIC TO DOMINATE MARKET DURING FORECAST PERIOD52

4PREMIUM INSIGHTS53

4.1ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET53

FIGURE 9GROWING GLOBAL POPULATION AND RISE IN URBANIZATION AND INDUSTRIALIZATION TO DRIVE MARKET53

4.2WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET. BY PRODUCT TYPE53

FIGURE 10	DISINFECTION TO BE FASTEST-GROWING SEGMENT DURING FORECAST PERIOD	53
4.3	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PROCESS	54
FIGURE 11	TERTIARY TO BE FASTEST-GROWING SEGMENT DURING FORECAST PERIOD	54
4.4	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER	54
FIGURE 12	INDUSTRIAL TO BE FASTEST-GROWING SEGMENT DURING FORECAST PERIOD	54
4.5	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY	55
FIGURE 13	INDIA TO BE FASTEST-GROWING MARKET DURING FORECAST PERIOD	55
5	MARKET OVERVIEW	56
5.1	INTRODUCTION	56
5.2	MARKET DYNAMICS	56
FIGURE 14	DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET	56
5.2.1	DRIVERS	57
5.2.1.1	Water scarcity and lack of freshwater driving adoption of sustainable water management practices	57
5.2.1.2	Increase in industrial water consumption and discharge	57
5.2.1.3	Growing global population and rise in urbanization and industrialization	58
5.2.2	RESTRAINTS	59
5.2.2.1	Stringent regulation in wastewater industry	59
5.2.3	OPPORTUNITIES	59
5.2.3.1	Smart water management & data analytics	59
5.2.3.2	Focus on water reuse & recycling	60
5.2.3.3	Growing demand for energy-efficient water treatment technologies	60
5.2.4	CHALLENGES	61
5.2.4.1	High installation, equipment, and operation costs	61
5.2.4.2	Aging infrastructure and lack of financing	61
6	INDUSTRY TRENDS	62
6.1	INTRODUCTION	62
6.2	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESSES	62
6.2.1	REVENUE SHIFT AND NEW REVENUE POCKETS FOR WATER & WASTEWATER TREATMENT EQUIPMENT MANUFACTURERS	62
FIGURE 15	REVENUE SHIFT OF WATER & WASTEWATER TREATMENT EQUIPMENT MARKET	63
6.3	PRICING ANALYSIS	63
6.3.1	AVERAGE SELLING PRICE TREND, BY REGION	64
FIGURE 16	WATER & WASTEWATER TREATMENT EQUIPMENT MARKET: AVERAGE SELLING PRICE TREND, BY REGION, 2020-2029	64
6.3.2	INDICATIVE PRICING ANALYSIS, BY PRODUCT TYPE	64
6.4	VALUE CHAIN ANALYSIS	65
FIGURE 17	VALUE CHAIN ANALYSIS	65
6.4.1	EQUIPMENT MANUFACTURERS	65
6.4.2	DISTRIBUTORS	65
6.4.3	INSTALLATION & OPERATIONAL SERVICES	66
6.4.4	END USERS	66
6.5	ECOSYSTEM/MARKET MAP	66
TABLE 1	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET: ECOSYSTEM	66
6.6	TECHNOLOGY ANALYSIS	68
TABLE 2	KEY TECHNOLOGIES OFFERED IN WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET	68
TABLE 3	COMPLEMENTARY TECHNOLOGIES OFFERED IN WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET	68
TABLE 4	ADJACENT TECHNOLOGIES OFFERED FOR WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET	69
6.7	PATENT ANALYSIS	69

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.7.1	INTRODUCTION	69
6.7.2	METHODOLOGY	69
6.7.3	DOCUMENT TYPE	70
TABLE 5 GRANTED PATENTS ACCOUNT FOR 20.8% OF TOTAL COUNT IN LAST 10 YEARS		
6.7.3.1	Publication trends over last ten years	70
FIGURE 18 NUMBER OF PATENTS GRANTED YEARLY OVER LAST 10 YEARS		
6.7.4	INSIGHTS	70
6.7.5	LEGAL STATUS OF PATENTS	71
6.7.6	JURISDICTION ANALYSIS	71
FIGURE 19 REGIONAL ANALYSIS OF PATENT GRANTED FOR WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, 2023		
6.7.7	TOP COMPANIES/APPLICANTS	72
FIGURE 20 TOP TEN COMPANIES WITH HIGHEST NUMBER OF PATENTS IN LAST TEN YEARS		
TABLE 6 MAJOR PATENTS FOR WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET		
6.7.8	MAJOR PATENTS	73
TABLE 7 MAJOR PATENTS FOR WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET		
6.8	TRADE ANALYSIS	77
6.8.1	IMPORT SCENARIO	77
FIGURE 21 IMPORT OF WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2019-2022		
6.8.2	EXPORT SCENARIO	78
FIGURE 22 EXPORT OF WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET BY COUNTRY, 2019-2022		
6.9	KEY CONFERENCES & EVENTS IN 2024-2025	78
TABLE 8 WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET: DETAILED LIST OF CONFERENCES AND EVENTS		
6.10	CASE STUDY	79
6.10.1	CASE STUDY FROM VEOLIA ABOUT BIOLOGICAL PACKAGED WASTEWATER TREATMENT UNITS ENSURES SAFE AND RELIABLE SEWAGE TREATMENT THROUGHOUT KUWAIT	79
6.10.2	CASE STUDY ABOUT XYLEM'S JABSCO BRAND PARTNERS WITH SWISS FRESH WATER ON INNOVATIVE REVERSE OSMOSIS WATER TREATMENT SOLUTION	79
6.10.3	CASE STUDY ABOUT KOREAN AUTOMAKER REDUCING WASTEWATER SLUDGE WITH EXPERT SUPPORT FROM NALCO WATER	80
6.11	TARIFF AND REGULATORY LANDSCAPE	80
6.11.1	TARIFF AND REGULATIONS RELATED TO WATER AND WASTEWATER TREATMENT EQUIPMENT	80
TABLE 9 TARIFFS RELATED TO WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET		
6.11.2	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	81
TABLE 10 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS		
TABLE 11 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS		
TABLE 12 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS		
TABLE 13 SOUTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS		
TABLE 14 MIDDLE EAST & AFRICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS		
6.12	PORTER'S FIVE FORCES ANALYSIS	83
TABLE 15 PORTER'S 5 FORCES IMPACT ON WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET		
FIGURE 23 PORTER'S FIVE FORCES ANALYSIS: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET		
6.12.1	THREAT OF NEW ENTRANTS	84
6.12.2	THREATS OF SUBSTITUTES	84
6.12.3	BARGAINING POWER OF SUPPLIERS	85
6.12.4	BARGAINING POWER OF BUYERS	85
6.12.5	INTENSITY OF COMPETITIVE RIVALRY	85
6.12.6	VOLUME DATA	86

6.12.7	GDP TRENDS AND FORECASTS OF MAJOR ECONOMIES	86
TABLE 16	PROJECTED REAL GDP GROWTH (ANNUAL PERCENTAGE CHANGE) OF KEY COUNTRIES, 2018-2025	86
6.13	KEY STAKEHOLDERS AND BUYING CRITERIA	87
6.13.1	KEY STAKEHOLDERS IN BUYING PROCESS	87
FIGURE 24	INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP 2 APPLICATIONS	87
TABLE 17	INFLUENCE OF INSTITUTIONAL BUYERS ON BUYING PROCESS FOR TOP 2 APPLICATIONS	87
6.13.2	BUYING CRITERIA	87
FIGURE 25	KEY BUYING CRITERIA FOR APPLICATION	88
TABLE 18	KEY BUYING CRITERIA FOR APPLICATIONS	88
6.14	INVESTMENT AND FUNDING SCENARIO	89
FIGURE 26	INVESTOR DEALS AND FUNDING IN WATER AND WASTEWATER TREATMENT EQUIPMENT SOARED IN 2023	89
7	WATER AND WASTEWATER TREATMENT MARKET, BY TYPE	90
7.1	INTRODUCTION	91
FIGURE 27	FILTRATION SEGMENT TO LEAD MARKET DURING FORECAST PERIOD	91
TABLE 19	WATER AND WASTEWATER TREATMENT MARKET, BY TYPE, 2020-2023 (USD MILLION)	91
TABLE 20	WATER AND WASTEWATER TREATMENT MARKET, BY TYPE, 2024-2029 (USD MILLION)	92
TABLE 21	WATER AND WASTEWATER TREATMENT MARKET, BY TYPE, 2020-2023 (THOUSAND UNITS)	92
TABLE 22	WATER AND WASTEWATER TREATMENT MARKET, BY TYPE, 2024-2029 (THOUSAND UNITS)	92
7.2	FILTRATION	93
7.2.1	MULTI-LAYERED DEFENSE SYSTEMS TO DRIVE DEMAND	93
7.2.2	GRANULAR/SAND FILTRATION	93
7.2.3	REVERSE OSMOSIS (RO)	93
7.2.4	MICROFILTRATION (MF)	94
7.2.5	OTHER TYPES	94
7.3	DISINFECTION	95
7.3.1	DISINFECTION SECURING WATER QUALITY THROUGH PATHOGEN ELIMINATION TO DRIVE MARKET	95
7.3.2	CHLORINE	95
7.3.3	ULTRAVIOLET	95
7.3.4	OZONE	96
7.3.5	OTHER DISINFECTIONS	96
7.4	DESALINATION	97
7.4.1	HIGH DEMAND FOR FRESHWATER IN WATER-SCARCE REGIONS TO DRIVE MARKET	97
7.5	SLUDGE TREATMENT	97
7.5.1	GROWING IMPORTANCE OF ENVIRONMENTAL PROTECTION AND RESOURCE RECOVERY TO DRIVE MARKET	97
7.6	BIOLOGICAL	98
7.6.1	MICROORGANISMS BREAKING DOWN POLLUTANTS TO IMPROVE WATER QUALITY SUSTAINABLY TO DRIVE MARKET	98
7.7	TESTING	98
7.7.1	BETTER WATER QUALITY, TREATMENT EFFICIENCY, AND REGULATORY COMPLIANCE TO DRIVE MARKET	98
8	WATER & WASTEWATER TREATMENT EQUIPMENT MARKET, BY PROCESS	99
8.1	INTRODUCTION	100
FIGURE 28	TERTIARY BY PROCESS TO LEAD MARKET DURING FORECAST PERIOD (2024-2029)	100
TABLE 23	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PROCESS, 2020-2023 (USD MILLION)	101
TABLE 24	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PROCESS, 2024-2029 (USD MILLION)	101
8.2	PRIMARY	101
8.2.1	REDUCING ORGANIC LOAD IN WASTEWATER, MAKING SUBSEQUENT TREATMENT STAGES MORE EFFICIENT, TO DRIVE MARKET	101
8.3	SECONDARY	102

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

8.3.1	BIOLOGICAL ACTIVITY ENHANCES WATER QUALITY AND SUPPORTS ECOLOGICAL BALANCE IN AQUATIC ENVIRONMENTS	102
8.4	TERTIARY	102
8.4.1	PRECISE CONTROL, HIGH EFFICIENCY, AND VERSATILITY IN REMOVING SPECIFIC CONTAMINANTS AND IMPROVING WATER CLARITY AND SAFETY TO DRIVE MARKET	102
9	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER	103
9.1	INTRODUCTION	104
FIGURE 29	MUNICIPAL SEGMENT TO DOMINATE MARKET DURING FORECAST PERIOD (USD MILLION)	104
TABLE 25	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	104
TABLE 26	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2030 (USD MILLION)	105
9.2	MUNICIPAL	105
9.2.1	ENSURING CLEAN WATER SUPPLY AND EFFECTIVE WASTEWATER MANAGEMENT FOR RESIDENTIAL AREAS AND COMMERCIAL BUSINESSES TO DRIVE MARKET	105
9.2.2	RESIDENTIAL	105
9.2.3	COMMERCIAL	106
9.3	INDUSTRIAL	106
9.3.1	PROMOTING SUSTAINABILITY AND ENVIRONMENT CONSCIOUSNESS THROUGH EFFECTIVE WATER MANAGEMENT AND WASTEWATER TREATMENT AND DISPOSAL	106
9.3.2	OIL & GAS	106
9.3.3	PULP & PAPER	107
9.3.4	CHEMICALS	107
9.3.5	FOOD & BEVERAGE	107
9.3.6	OTHER END USERS	107
10	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY REGION	109
10.1	INTRODUCTION	110
FIGURE 30	ASIA PACIFIC TO BE FASTEST-GROWING MARKET DURING FORECAST PERIOD	110
TABLE 27	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY REGION, 2020-2023 (USD MILLION)	111
TABLE 28	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY REGION, 2024-2029 (USD MILLION)	111
TABLE 29	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY REGION, 2020-2023 (THOUSAND UNITS)	111
TABLE 30	WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY REGION, 2024-2029 (THOUSAND UNITS)	112
10.2	ASIA PACIFIC	112
FIGURE 31	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET SNAPSHOT	113
10.2.1	RECESSION IMPACT	113
TABLE 31	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2020-2023 (USD MILLION)	114
TABLE 32	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2024-2029 (USD MILLION)	114
TABLE 33	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2020-2023 (THOUSAND UNITS)	115
TABLE 34	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2024-2029 (THOUSAND UNITS)	115
TABLE 35	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	115
TABLE 36	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	116
TABLE 37	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (THOUSAND UNITS)	116
TABLE 38	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (THOUSAND UNITS)	116
TABLE 39	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PROCESS, 2020-2023 (USD MILLION)	117

TABLE 40	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PROCESS, 2024-2029 (USD MILLION)	117
TABLE 41	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER 2020-2023 (USD MILLION)	117
TABLE 42	ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER 2024-2029 (USD MILLION)	117
10.2.2	CHINA	118
10.2.2.1	Rapid urbanization and population growth to drive market	118
TABLE 43	CHINA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	118
TABLE 44	CHINA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	119
TABLE 45	CHINA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER 2020-2023 (USD MILLION)	119
TABLE 46	CHINA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER 2024-2029 (USD MILLION)	119
10.2.3	JAPAN	119
10.2.3.1	Focus on advanced technologies, stringent regulations, and commitment to sustainable water management to drive market	119
TABLE 47	JAPAN: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	120
TABLE 48	JAPAN: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	120
TABLE 49	JAPAN: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	120
TABLE 50	JAPAN: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	121
10.2.4	INDIA	121
10.2.4.1	Need for advanced water and wastewater treatment to drive market	121
TABLE 51	INDIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	122
TABLE 52	INDIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	122
TABLE 53	INDIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER 2020-2023 (USD MILLION)	122
TABLE 54	INDIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER 2024-2029 (USD MILLION)	122
10.2.5	SOUTH KOREA	123
10.2.5.1	Limited freshwater resources and growing emphasis on water reuse in high-tech industries	123
TABLE 55	SOUTH KOREA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	123
TABLE 56	SOUTH KOREA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	124
TABLE 57	SOUTH KOREA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	124
TABLE 58	SOUTH KOREA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	124
10.2.6	AUSTRALIA	124
10.2.6.1	Robust government investment in water infrastructure and evolving trends in wastewater treatment technology adoption to drive market	124
TABLE 59	AUSTRALIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	125
TABLE 60	AUSTRALIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	125
TABLE 61	AUSTRALIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	126
TABLE 62	AUSTRALIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	126
10.2.7	REST OF ASIA PACIFIC	126
TABLE 63	REST OF ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	127
TABLE 64	REST OF ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	127
TABLE 65	REST OF ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD	

MILLION)127

TABLE 66REST OF ASIA PACIFIC: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)127

10.3EUROPE128

FIGURE 32EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET SNAPSHOT129

10.3.1RECESSION IMPACT129

TABLE 67EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2020-2023 (USD MILLION)130

TABLE 68EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2024-2029 (USD MILLION)130

TABLE 69EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2020-2023 (THOUSAND UNITS)131

TABLE 70EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2024-2029 (THOUSAND UNITS)131

TABLE 71EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)131

TABLE 72EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)132

TABLE 73EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (THOUSAND UNITS)132

TABLE 74EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (THOUSAND UNITS)132

TABLE 75EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PROCESS, 2020-2023 (USD MILLION)133

TABLE 76EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PROCESS, 2024-2029 (USD MILLION)133

TABLE 77EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)133

TABLE 78EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)133

10.3.2GERMANY134

10.3.2.1Increased public awareness and stringent government regulations to drive market134

TABLE 79GERMANY: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)134

TABLE 80GERMANY: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)135

TABLE 81GERMANY: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)135

TABLE 82GERMANY: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)135

10.3.3UK135

10.3.3.1Strict regulations and high compliance rates in wastewater treatment to drive demand135

TABLE 83UK: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)136

TABLE 84UK: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)136

TABLE 85UK: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)137

TABLE 86UK: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)137

10.3.4FRANCE137

10.3.4.1Continuous maintenance and replacement of aging infrastructure to fuel demand for equipment and services137

TABLE 87FRANCE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)138

TABLE 88FRANCE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)138

TABLE 89FRANCE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)138

TABLE 90FRANCE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)138

10.3.5ITALY139

10.3.5.1Aging infrastructure and investments in wastewater treatment sectors to drive market139

TABLE 91ITALY: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)139

TABLE 92ITALY: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)140

TABLE 93ITALY: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)140

TABLE 94ITALY: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)140

10.3.6RUSSIA140

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.3.6.1	Need for infrastructure modernization and tackling water bodies pollution to drive market	140
TABLE 95	RUSSIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	141
TABLE 96	RUSSIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	141
TABLE 97	RUSSIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	141
TABLE 98	RUSSIA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	142
10.3.7	REST OF EUROPE	142
TABLE 99	REST OF EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	142
TABLE 100	REST OF EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	143
TABLE 101	REST OF EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	143
TABLE 102	REST OF EUROPE: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	143
10.4	NORTH AMERICA	143
FIGURE 33	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET SNAPSHOT	144
10.4.1	RECESSION IMPACT	144
TABLE 103	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2020-2023 (USD MILLION)	145
TABLE 104	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2024-2029 (USD MILLION)	145
TABLE 105	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2020-2023 (THOUSAND UNITS)	145
TABLE 106	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY COUNTRY, 2024-2029 (THOUSAND UNITS)	146
TABLE 107	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	146
TABLE 108	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	146
TABLE 109	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (THOUSAND UNITS)	147
TABLE 110	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (THOUSAND UNITS)	147
TABLE 111	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PROCESS, 2020-2023 (USD MILLION)	147
TABLE 112	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PROCESS, 2024-2029 (USD MILLION)	148
TABLE 113	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	148
TABLE 114	NORTH AMERICA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	148
10.4.2	US	148
10.4.2.1	Increased emphasis on water reuse initiatives to drive demand for advanced water and wastewater treatment equipment	148
TABLE 115	US: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	149
TABLE 116	US: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	149
TABLE 117	US: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	150

TABLE 118	US: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	150
10.4.3	CANADA	150
10.4.3.1	Drive for comprehensive wastewater treatment to safeguard environmental and human health through advanced treatment technologies and infrastructure investments to drive market	150
TABLE 119	CANADA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	151
TABLE 120	CANADA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	151
TABLE 121	CANADA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	151
TABLE 122	CANADA: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	152
10.4.4	MEXICO	152
10.4.4.1	Government investments to aging water infrastructure upgrade to drive market	152
TABLE 123	MEXICO: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	153
TABLE 124	MEXICO: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	153
TABLE 125	MEXICO: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	153
TABLE 126	MEXICO: WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	153
10.5	SOUTH AMERICA	154
10.5.1	RECESSION IMPACT	154
TABLE 127	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY COUNTRY, 2020-2023 (USD MILLION)	155
TABLE 128	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY COUNTRY, 2024-2029 (USD MILLION)	155
TABLE 129	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY COUNTRY, 2020-2023 (THOUSAND UNITS)	155
TABLE 130	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY COUNTRY, 2024-2029 (THOUSAND UNITS)	156
TABLE 131	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	156
TABLE 132	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	156
TABLE 133	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (THOUSAND UNITS)	157
TABLE 134	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (THOUSAND UNITS)	157
TABLE 135	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PROCESS, 2020-2023 (USD MILLION)	157
TABLE 136	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PROCESS, 2024-2029 (USD MILLION)	158
TABLE 137	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	158
TABLE 138	SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	158
10.5.2	BRAZIL	158
10.5.2.1	Well-established government plans to conserve water and reuse wastewater in industrial sectors to propel demand	158
TABLE 139	BRAZIL: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	159
TABLE 140	BRAZIL: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	159
TABLE 141	BRAZIL: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	160
TABLE 142	BRAZIL: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	160
10.5.3	ARGENTINA	160
10.5.3.1	Substantial foreign investments in industrial sector to drive demand	160
TABLE 143	ARGENTINA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	161
TABLE 144	ARGENTINA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	161
TABLE 145	ARGENTINA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	161
TABLE 146	ARGENTINA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	161
10.5.4	REST OF SOUTH AMERICA	162

TABLE 147	REST OF SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	162
TABLE 148	REST OF SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	162
TABLE 149	REST OF SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	163
TABLE 150	REST OF SOUTH AMERICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	163
10.6	MIDDLE EAST AND AFRICA	163
10.6.1	RECESSION IMPACT	164
TABLE 151	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY COUNTRY, 2020-2023 (USD MILLION)	164
TABLE 152	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY COUNTRY, 2024-2029 (USD MILLION)	165
TABLE 153	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY COUNTRY, 2020-2023 (THOUSAND UNITS)	165
TABLE 154	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY COUNTRY, 2024-2029 (THOUSAND UNITS)	165
TABLE 155	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	166
TABLE 156	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	166
TABLE 157	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (THOUSAND UNITS)	166
TABLE 158	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (THOUSAND UNITS)	167
TABLE 159	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PROCESS, 2020-2023 (USD MILLION)	167
TABLE 160	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PROCESS, 2024-2029 (USD MILLION)	167
TABLE 161	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	167
TABLE 162	MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	168
10.6.2	SAUDI ARABIA	168
10.6.2.1	Well-established oil & gas industry coupled with ambitious infrastructure development projects to drive market	168
TABLE 163	SAUDI ARABIA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	168
TABLE 164	SAUDI ARABIA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	169
TABLE 165	SAUDI ARABIA: WATER & WASTEWATER EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	169
TABLE 166	SAUDI ARABIA: WATER & WASTEWATER EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	169
10.6.3	UAE	169
10.6.3.1	Strategic investments in wastewater treatment plants to drive market	169
TABLE 167	UAE: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	170
TABLE 168	UAE: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	170
TABLE 169	UAE: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	171
TABLE 170	UAE: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	171
10.6.4	SOUTH AFRICA	171
10.6.4.1	Strategic approach to water security and water treatment to drive market	171
TABLE 171	SOUTH AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION)	172
TABLE 172	SOUTH AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION)	172
TABLE 173	SOUTH AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION)	172
TABLE 174	SOUTH AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION)	173
10.6.5	REST OF GCC COUNTRIES	173

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.6.5.1 Rest of GCC countries combating water pollution, safeguarding natural water sources, and promoting sustainable water management to drive market 173

TABLE 175 REST OF GCC COUNTRIES: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION) 173

TABLE 176 REST OF GCC COUNTRIES: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION) 174

TABLE 177 REST OF GCC COUNTRIES: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION) 174

TABLE 178 REST OF GCC COUNTRIES: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION) 174

10.6.6 REST OF MIDDLE EAST & AFRICA 174

TABLE 179 REST OF MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2020-2023 (USD MILLION) 175

TABLE 180 REST OF MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY PRODUCT TYPE, 2024-2029 (USD MILLION) 175

TABLE 181 REST OF MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2020-2023 (USD MILLION) 176

TABLE 182 REST OF MIDDLE EAST & AFRICA: WATER AND WASTEWATER EQUIPMENT MARKET, BY END USER, 2024-2029 (USD MILLION) 176

11 COMPETITIVE LANDSCAPE 177

11.1 INTRODUCTION 177

11.2 KEY PLAYER STRATEGIES 177

11.2.1 OVERVIEW OF STRATEGIES ADOPTED BY WATER AND WASTEWATER TREATMENT EQUIPMENT MANUFACTURERS 177

11.3 MARKET SHARE ANALYSIS 179

11.3.1 RANKING OF KEY MARKET PLAYERS, 2023 179

FIGURE 34 RANKING OF TOP FIVE PLAYERS IN WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, 2023 179

11.3.2 MARKET SHARE OF KEY PLAYERS 179

TABLE 183 WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET: DEGREE OF COMPETITION 179

FIGURE 35 SHARE OF KEY PLAYERS IN WATER AND WASTEWATER TREATMENT EQUIPMENT MARKET, 2023 180

11.3.2.1 VEOLIA (FRANCE) 180

11.3.2.2 XYLEM (US) 180

11.3.2.3 ECOLAB (US) 180

11.3.2.4 DUPONT (US) 181

11.3.2.5 PENTAIR (UK) 181

**Water and Wastewater Treatment Equipment Market by Product Type (Filtration, Disinfection, Desalination, Sludge Treatment, Biological), Process (Primary, Secondary And Tertiary), End-User (Municipal, Industrial), And Region -Global
Forecast to 2029**

Market Report | 2024-04-09 | 257 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-05-19
		Signature	<div></div>