

Produced Water Treatment Market by Application (Onshore, Offshore), Source (Conventional, Unconventional), Treatment (Primary treatment, Secondary treatment, Tertiary treatment) and Region - Global Forecast to 2029

Market Report | 2024-06-12 | 217 pages | MarketsandMarkets

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Report description:

The produced water treatment market is forecast to reach USD 13.4 billion by 2029 from an estimated USD 10.7 billion in 2024, at a CAGR of 4.7% during the forecast period (2024-2029). The rise in the demand for Exploration & production activities, and the need to treat the produced water from contaminants is driving the market.

"Conventional: The second fastest growing segment of the produced water treatment market, by source."

Based on source, the produced water treatment market has been split into two types: Conventional and Unconventional. The conventional segment is expected to be the second fastest segment in the market. Conventional resources denote the deposits of hydrocarbons that can be extracted using traditional drilling and production methods. These resources are usually found in geological formations where the hydrocarbons are trapped under relatively high pressure, allowing them to flow to the surface when extracted by a well.

"Primary treatment segment is expected to emerge as the third fastest segment by treatment."

Based on treatment, the produced water treatment market has been segmented into Primary treatment, Secondary treatment, and tertiary treatment. The Primary treatment segment is expected to be the third fastest segment in the market. Primary treatment uses technologies such as hydrocyclones, and dissolved air floatation (DAF) systems because of their effectiveness in removing oil and suspended solids from the produced water. The primary treatment is essential in the process to be more efficient and cost effective.

"North America is expected to be the largest region in the produced water treatment market."

North America is expected to be the largest region in the produced water treatment market between 2024-2029. The market in North America comprises US, Canada, and Mexico. The growth of the produced water treatment market in the North America region is largely supported by the abundant unconventional resources, Increasing Exploration & Production activities, and

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favorable regulatory environment. North America is home to major oilfield service companies such as Baker Hughes, DuPont, SLB, Nov Inc, and Weatherford. These companies provide a wide range of produced water treatment and services, contributing to the market's growth.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 25%, Tier 2- 25%, and Tier 3- 50%

By Designation: C-Level- 25%, Director Levels- 33%, and Others- 42%

By Region: North America- 25%, Europe- 8%, Asia Pacific- 33%, South America- 17%, and Middle East & Africa- 17%

Note: Others include product engineers, product specialists, and engineering leads.

Note: The tiers of the companies are defined based on their total revenues as of 2022. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: < USD 500 million

The produced water treatment market is dominated by a few major players that have and a large number of smaller players with strong regional presence. The leading players in the produced water treatment market are SLB (US), Baker Hughes Co (US), Dupont (US), Siemens Energy (Germany), Veolia Environnement SA (France), TechnipFMC (UK).

Research Coverage:

The report defines, describes, and forecasts the produced water treatment market, by source, by application, by treatment, for various regions. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a comprehensive review of the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market estimates, in terms of value, and future trends in the produced water treatment market.

Key Benefits of Buying the Report

-□Environmental regulations, increased oil and gas production activities, technological advancements, water scarcity concerns are some of the factors driving the produced water treatment market. High treatment costs, volatility in oil prices, and complexity of produced water composition hinder produced water treatment market growth. The Expansion into emerging markets, collaborations and partnerships offer opportunities in this market. Regulatory compliance and market fragmentation are some of the challenges faced in this market.

-□Product Development/ Innovation: Developments such as the Advanced membrane filtration technologies and electrochemical treatment methods are a pivotal trend in produced water treatment development. Advanced membrane filtration technologies offer high efficiency in removing impurities and filtering clean water for reuse, focusing on both environmental and economic interests. Electrochemical treatment methods are effective in removing heavy metals, oil, and other pollutants from produced water, thus by providing an alternative to traditional chemical treatments.

-□Market Development: The development of produced water treatment is essential in providing safe and productive extraction of oil and gas during increasing demand periods. Favorable government policies promoting energy security, increasing investments in like oil & gas, advancements in Oilfield Technologies create produced water treatment market growth.

-□Market Diversification: TechnipFMC signed an agreement with the Island offshore group to acquire a 51% stake in Island offshore's wholly owned subsidiary, Island offshore Subsea AS. Island Offshore Subsea AS provides Riserless Light Well Intervention (RLWI) project management and engineering services for plug & abandonment (P&A), riserless coiled tubing and well completion operations.

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like SLB (US), Baker Hughes Co (US), Siemens Energy (Germany), Dupont (US), Veolia Environnement SA (France), TechnipFMC (France) among others in the produced water treatment market.

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