Europe Water Automation And Instrumentation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The Europe Water Automation And Instrumentation Market size is estimated at USD 12.19 billion in 2025, and is expected to reach USD 17.27 billion by 2030, at a CAGR of 7.21% during the forecast period (2025-2030).

Key Highlights
- Europe's water automation and instrumentation market are estimated to increase in the years to come. This increase is because of a variety of factors, including increased usage of water in sectors like the generation of electricity, wastewater treatment plants, the supply of clean water, etc.
- Managing operational costs emerged as one of the biggest challenges posed by stakeholders of the water industry, as the governments are imposing regulations, along with the depletion of potable water resources. Expenses relating to labor and energy constitute the largest share of OPEX for water utilities.
- Several water automation-related technology developments currently being explored in the market include smart monitoring technologies using pressure and acoustic sensors to detect, report, and reduce water loss via wireless monitoring systems; and recent advances in water management through optimizing wastewater processing and recycling, as tracking data and scientific understanding continues to improve.
- Non-revenue water (NRW) is known as water lost before it reaches a customer. Losses can occur from leaks in the distribution network, during a theft, etc. According to the World Bank, the total cost of water utilities from non-revenue water worldwide can be conservatively estimated at USD 141 billion yearly, with a third of it occurring in the developing world. The rising demand to reduce non-revenue water losses led water utilities to adopt advanced water management solutions.
- Water automation is greatly used in water treatment plants as in a traditional water treatment plant, employees periodically sample the water to gather data. This process is slow and provides only a limited scope, rendering itself insufficient for the modern world. Automated water treatment can enable ongoing sampling, saving time and providing better, more complete data.

- The instrumentation and automation solutions involved in the water industry need periodic maintenance. Therefore, the pressure lies on the end-user of the equipment, who must bear the maintenance expenses throughout the product's lifetime. Also, their maintenance and handling require a high skill. Consequently, manufacturers face difficulties while operating automation and control systems due to a lack of qualified and skilled applicants.
- The outbreak of COVID-19 halted production and disrupted the supply chain, which led to weakened industrial output growth and the decline in the production of multiple types of equipment, such as transmitters, and affected the use of HMI SCADA systems and distributed control systems.

Europe Water Automation And Instrumentation Market Trends

Demand from Food and Beverage Industry to Witness a Significant Growth Rate

- The production of food and beverage requires a large amount of water. Water quality is crucial to product quality and operational reliability as water is one of the important raw materials in the food and beverage processing industry. The implementation of water and wastewater automation in the food and beverage industry can save significant revenues for the company, along with eliminating errors and waste, enhancing efficiency and productivity, and expanding profit margins.
- Further, various companies in the Food and beverage industry are deploying various automation and instrumentation methods. For instance, a food processing plant in Peru was faced with natural groundwater contaminated with high turbidity and arsenic, making it unsuitable for use in food processing. AMI's custom-engineered solution incorporates ultrafiltration membranes with pretreatment by coagulant and depth filtration, as well as chlorination of the filtrate to produce water, meeting the customer's high-quality standards for use in food product processing. The system is AMI PLC automated using a central control enclosure and touchscreen HMI operator interface.
- Moreover, instrumentation technology such as liquid analyzers, pressure measurement systems, and flow measurement systems is being deployed in the food and beverage industry to reduce the volume of wastewater during the process by using the above-mentioned instrumentation technology when discharging products from the lines. Further, Raw water, process water, or wastewater can be efficiently monitored with modular, space-saving analysis panels. This simplifies daily process integration and operation in the food and beverage industries.
- Also, automation technologies such as DCS and SCADA, among others, are used in various food and beverage industries to control various instrumentality types, including variable speed drives, quality control systems, motor control centers (MCC), kilns, manufacturing equipment, and manage the water and wastewater treatment.

France to lead the Water Automation and Instrumentation in the region

- In France, the amount of water withdrawn for drinking water is marginally smaller than the EU average but far smaller than average in other developed countries like the USA or Japan. Moreover, according to a report published in fp2e.org, the total amount of water withdrawn for drinking water in Metropolitan France was 5.4 billion m3, representing an annual amount of just over 85 m3 of water per person, 234 liters per person per day. There is an urgent need to bring this water usage in check to monitor, efficiently distribute, and control the water shortage in the region.
- The government is encouraging new projects of wastewater treatment plants in the region, and increased competition and eroding margins in utilities, transport, government, infrastructure, resources, and manufacturing make automation technologies very critical. Recently, the SUEZ and Schneider Electric groups announced the creation of a leader in digital water to develop and market a joint offering of innovative digital solutions for managing the water cycle. This collaboration will support municipal water operators and industrial players in accelerating their digital transformation by providing them with a unique range of software

solutions for planning, operating, maintaining, and optimizing water treatment infrastructure.
- The pandemic did cause havoc across the world, due to which the French drinking water suppliers increased the dose of chlorine in the water distribution networks. It was mainly done since many companies have ceased their activities. The water in the pipes remained stagnant for longer, so adding more chlorine prevented possible microbes or viruses from appearing.
- Moreover, climate change and exceptionally warm and dry winters are exacerbating water resources across the country, leaving France no choice but to implement water rationing schemes in the most-hit provinces. For instance, in Feb 2023, the government announced a five-year anti-drought plan, which includes reducing at least 10% of the water from subsoil by 2027 and a scheme to ramp up wastewater reprocessing.
- Such an instance would drive the demand for automated sensors and monitoring systems in the studied market, and more and more companies are aiming to reduce their energy consumption and increase their operational efficiency.

Europe Water Automation And Instrumentation Industry Overview

As the market is fragmented, there is major competition between the major players. Therefore, the market concentration is expected to be low. The major players include ABB Group, Siemens AG, Schneider Electric SE, GE Corporation, Rockwell Automation Inc., Mitsubishi Motors Corporation, Emerson Electric, Yokogawa Electric Corporation, Endress+ Hauser Pvt. Ltd, EurotekIndia, Phoenix Contact, NALCO, MJK Automation, and Blue Water Automation.

Countries like France, Germany, and the United Kingdom are leading the market due to their significant investments in water infrastructure and automation technologies. France's initiatives to enhance drinking water management highlight the urgent need for efficient monitoring systems in response to dwindling resources.

In summary, the European Water Automation and Instrumentation market is evolving rapidly due to technological advancements, regulatory pressures, and an increasing focus on sustainability. These trends indicate a robust future for automation solutions aimed at improving water quality and management across various sectors.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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