

# Global Primary Water and Wastewater Treatment Equipment Market Size Study & Forecast, by Equipment, Application, and Regional Forecasts 2025-2035

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## Abstracts

The Global Primary Water and Wastewater Treatment Equipment Market is valued at approximately USD 13.02 billion in 2024 and is projected to expand at a compound annual growth rate of more than 4.30% during the forecast period from 2025 to 2035. As water stress intensifies globally, driven by population growth, rapid industrialization, and climate change, primary treatment technologies have become critical in mitigating environmental impacts and preserving freshwater ecosystems. These systems—responsible for removing suspended solids, floating debris, and organic matter from raw sewage—form the backbone of municipal and industrial wastewater infrastructures. With increasing scrutiny on water quality compliance and sustainability metrics, primary treatment equipment like clarifiers are witnessing renewed investment from both public and private sectors.

The market's forward momentum is largely underpinned by growing regulatory pressures and the need for improved sanitation in emerging economies. Developed nations, on the other hand, are retrofitting and upgrading aging wastewater treatment assets to align with evolving environmental standards and climate adaptation goals. Simultaneously, the integration of smart sensors, automated controls, and IoT-enabled monitoring systems into conventional primary treatment equipment is accelerating operational efficiencies while reducing downtime and maintenance overhead. Industrial users—especially in sectors such as petrochemicals, pharmaceuticals, pulp & paper, and food & beverages—are also stepping up their adoption of robust water treatment solutions to ensure water reuse, minimize waste discharge, and support their ESG goals.

From a regional standpoint, North America held a commanding share of the market in 2024, driven by robust infrastructure, stringent EPA guidelines, and large-scale investments in utility upgrades. The United States continues to dominate in terms of installed capacity, with significant spending channeled into rehabilitating outdated treatment plants and expanding rural sanitation systems. Europe, with its environmentally progressive policies, particularly in Germany, the UK, and the Nordic nations, continues to lead in innovation and sustainable water practices. Meanwhile, Asia Pacific is expected to emerge as the fastest-growing regional market over the forecast timeline. Countries such as China and India are experiencing a surge in industrial output and urban migration, which in turn is fueling government-led initiatives to improve wastewater management, particularly in tier-2 and tier-3 cities.

Major market player included in this report are:

Veolia Environnement S.A.

SUEZ SA

Evoqua Water Technologies

Xylem Inc.

Ecolab Inc.

AECOM

Thermax Limited

Kurita Water Industries Ltd.

Pentair plc

Hitachi Zosen Corporation

Aquatech International LLC

Huber SE

DuPont de Nemours, Inc.

Toshiba Water Solutions

IDE Technologies Ltd.

## Global Primary Water and Wastewater Treatment Equipment Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Equipment:

Primary Clarifier

By Application:

Municipal

Industrial

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market

approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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