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Zero Liquid Discharge (ZLD) Systems Market - 2025-2035

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Abstracts

The Zero Liquid Discharge (ZLD) Systems Market was valued at US$ 8.38 billion in 2025 and is anticipated to reach US$ 16.73 billion by 2035, at a CAGR of 0.072 from 2026 to 2032.

The report delivers in-depth insights into key market dynamics, including regional growth trends, market segmentation, CAGR projections, and the revenue performance of leading industry players. It also highlights major growth drivers shaping the market landscape. Designed to provide a clear and comprehensive perspective, the report offers a detailed view of the current market size in terms of both value and volume, along with emerging opportunities and the overall development outlook of the Zero Liquid Discharge (ZLD) Systems Market.

This report delivers a comprehensive overview of the Zero Liquid Discharge (ZLD) Systems Market, with both quantitative and qualitative analyses, to help readers develop growth strategies, assess the competitive landscape, evaluate their position in the current market, and make informed business decisions regarding Zero Liquid Discharge (ZLD) Systems Market. The Zero Liquid Discharge (ZLD) Systems Market size, estimates, and forecasts are provided in terms of output/shipments (K MT) and revenue (US$ millions), with 2025 as the base year and historical and forecast data for 2025–2035.

Zero Liquid Discharge (ZLD) Systems Market Scope:

By System Architecture

Thermal Dominant ZLD Systems

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- Hybrid Membrane and Thermal ZLD Systems
- Resource Recovery ZLD Systems
- Packaged and Modular ZLD Systems

By Process Stage

- Pretreatment
- Primary concentration and separation
- Thermal concentration
- Crystallization and solids handling
- Polishing and reuse

By Technology Platform

- Thermal technologies
- Membrane technologies
- Enabling pretreatment and polishing technologies
- Digital and automation technologies

By Wastewater Source

- Power and utility wastewater
- Industrial brines and rejects
- Sector specific process wastewater

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By Application

- Compliance and discharge elimination
- Water reuse and recycle
- Resource recovery
- Brine minimization and concentration

By End-User

- Power generation
- Oil and gas and refining
- Chemicals
- Mining and metals
- Semiconductor and electronics
- Pharmaceuticals and life sciences
- Textiles, dyeing and leather
- Pulp and paper
- Municipal and landfill leachate
- Others

By Plant Capacity

- Less than 50 m3 per day

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50 to 250 m3 per day

250 to 1,000 m3 per day

1,000 to 5,000 m3 per day

Above 5,000 m3 per day

By Feedwater TDS

Below 10,000 mg per L

10,000 to 35,000 mg per L

35,000 to 70,000 mg per L

70,000 to 150,000 mg per L

Above 150,000 mg per L

By Recovery Objective

Water Reuse with solids disposal

Water and salt recovery

Water and metal and mineral recovery

Water and chemical recovery

Water and solvent recovery

By Contract and Delivery Model

EPC and turnkey

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- Design build
- BOO and BOOT
- Lease and Rental
- O and M contracts
- Retrofit and brownfield
- Greenfield

By Offering

- Full turnkey ZLD plants
- Packaged modules
- Standalone evaporators
- Standalone crystallizers
- Pretreatment skids
- Automation and digital layer
- Aftermarket parts and consumables
- O and M and service support

Key Players

- Veolia Water Technologies
- SUEZ Water Technologies & Solutions

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Alfa Laval

GEA Group Aktiengesellschaft

Aquatech International LLC

IDE Technologies

Mitsubishi Heavy Industries Ltd.

Thermax Limited

Praj Industries

Toshiba Infrastructure Systems & Solutions Corporation

Doosan Corporation

Saltworks Technologies Inc.

H2O GmbH

Aquarion AG

Evoqua Water Technologies

Xylem Inc.

SafBon Water Technology

Petro Sep Corporation

Oasys Water Inc.

Condorchem Envitech

Major Highlights

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This report will assist keyword manufacturers, new entrants, and companies across the industry value chain with information on revenues, production, and average prices for the overall market and its sub-segments, by company, by Type, by Application, and by region.

Regional Analysis:

North America (U.S., Canada, Mexico)

Europe (U.K., Italy, Germany, Russia, France, Spain, The Netherlands and Rest of Europe)

Asia-Pacific (India, Japan, China, South Korea, Australia, Indonesia Rest of Asia Pacific)

South America (Colombia, Brazil, Argentina, Rest of South America)

Middle East & Africa (Saudi Arabia, U.A.E., South Africa, Rest of Middle East & Africa)

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Identify high potential M&A targets based on synergies, market positioning and growth trajectory.

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Target Audience 2026

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Industry Investors/Investment Bankers

Research Professionals

Emerging Companies

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13. BY PLANT CAPACITY

14. BY FEEDWATER TDS

15. BY RECOVERY OBJECTIVE

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19. COMPETITIVE LANDSCAPE

20. COMPANY PROFILES

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