

# Global Electrodialysis Systems and Equipment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Electrodialysis Systems and Equipment market size is expected to reach \$ 891 million by 2032, rising at a market growth of 9.6% CAGR during the forecast period (2026-2032).

The product boundary is widening, and Electrodialysis Systems and Equipment is evolving from a conventional desalination package into an electrically driven ion-management platform. The commercial scope now extends beyond standard ED to include EDR, bipolar membrane electrodialysis, selective ion-separation stacks, rectifiers and control systems, skid-mounted units, and integrated process packages linked to upstream and downstream operations. For industrial customers, the value proposition of Electrodialysis Systems and Equipment has also moved beyond simple salt removal toward acid and caustic generation, product recovery, lithium battery materials purification, high-salinity resource recovery, and industrial reuse. The competitive focus is increasingly shifting from membrane chemistry alone toward system design, stack scale-up, operating stability, and application-specific execution.

Competitive stratification is becoming more visible, and the market is now shaped by three parallel forces: global platform leaders, European specialists, and a rising Chinese electro-membrane manufacturing cluster. Based on 2025 actual data, the top five vendors by revenue were Veolia, Hangzhou Lanran, PCCell GmbH, Astom, and Eurodia. By shipments, the top five were Veolia, Hangzhou Lanran, PCCell GmbH, Eurodia, and Shandong Tianwei. The two rankings do not fully overlap, which is commercially significant. It shows that Electrodialysis Systems and Equipment is not a pure volume market. It already supports differentiated models based on higher-value process packages, premium-performance systems, and standardized equipment. Veolia reflects global platform integration, PCCell GmbH, Eurodia, Astom, and MEGA

represent specialist engineering depth, while Hangzhou Lanran, Shandong Tianwei, Hangzhou Createnviro, and Zhejiang Lanjimo reflect manufacturing efficiency and deployment speed.

Regional structure is now clearly defined, with Asia-Pacific as the scale center, Europe as the technology center, and North America as the higher-value application growth zone. In 2025, Asia-Pacific accounted for 49.5% of global shipments, while Europe and North America accounted for 22.4% and 19.7%, respectively. Asia-Pacific is already the largest production and deployment base for Electrodialysis Systems and Equipment. Looking at 2026-2032, shipment CAGR is about 11.0% in North America, 10.8% in Asia-Pacific, 10.8% in Latin America, 10.1% in Europe, and 10.4% in the Middle East and Africa. Growth is therefore broad-based rather than dependent on a single geography. Commercially, Asia-Pacific supports scale manufacturing and cost optimization, Europe retains pricing power in food, pharmaceutical, specialty chemical, and high-end stack applications, while North America is well positioned in lithium battery materials and difficult brine resource recovery.

Category mix is reshaping the future profit pool, and bipolar membrane electrodialysis is moving from a technical option into a high-value core segment. In 2025, homogeneous membrane systems represented 49.3% of global shipments, making them the largest shipment category. On a revenue basis, however, bipolar membrane systems already accounted for 39.2%, slightly above homogeneous membrane systems at 38.9%, despite contributing only 14.1% of shipments. That implies a much higher value density. Over 2026-2032, shipment CAGR for heterogeneous, homogeneous, and bipolar membrane systems is about 7.1%, 11.5%, and 14.3%, respectively; on a revenue basis, the corresponding CAGR profile is about -0.7%, 10.4%, and 29.6%. This makes bipolar membrane systems the most important structural driver of future margin expansion.

Application structure is undergoing a fundamental shift, and Electrodialysis Systems and Equipment is moving from a water-treatment-led market toward a model anchored by water treatment but increasingly driven by materials upgrading and resource recovery. In 2025, water treatment remained the largest end market, accounting for 35.6% of shipments and 43.8% of revenue. Food and pharmaceutical represented 23.0% of shipments and 12.8% of revenue. Acid and alkali production, seawater desalination, and lithium battery applications accounted for 13.9%, 11.8%, and 11.9% of revenue, respectively. More importantly, over 2026-2032, revenue CAGR is projected at 15.5% for acid and alkali production, 17.4% for lithium battery applications, 9.1% for food and pharmaceutical, 5.3% for water treatment, and 7.9% for seawater desalination. At the frontier, bipolar membrane electrodialysis is also extending into seawater- and air-

based carbon capture through pH-swing pathways for dissolved inorganic carbon release and absorbent regeneration.

This report studies the global Electrodialysis Systems and Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Electrodialysis Systems and Equipment and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Electrodialysis Systems and Equipment that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Electrodialysis Systems and Equipment total production and demand, 2021-2032, (Units)

Global Electrodialysis Systems and Equipment total production value, 2021-2032, (USD Million)

Global Electrodialysis Systems and Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Electrodialysis Systems and Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Electrodialysis Systems and Equipment domestic production, consumption, key domestic manufacturers and share

Global Electrodialysis Systems and Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Electrodialysis Systems and Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Electrodialysis Systems and Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Electrodialysis Systems and Equipment market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Veolia, Hangzhou Lanran, PCCell GmbH, Eurodia, Astom, AGC Engineering, MEGA, Shandong Tianwei Membrane Technology, Saltworks Technologies, Electrosynthesis Company, etc.

This report also provides key insights about market drivers, restraints, opportunities,

new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Electrodialysis Systems and Equipment market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Electrodialysis Systems and Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Electrodialysis Systems and Equipment Market, Segmentation by Type:

Heterogeneous Membrane

Homogeneous Membrane

Bipolar Membrane

## Global Electrodialysis Systems and Equipment Market, Segmentation by Operation:

Continuous Production

Batch Production

## Global Electrodialysis Systems and Equipment Market, Segmentation by Process Capacity:

Industrial Grade

Laboratory Grade

## Global Electrodialysis Systems and Equipment Market, Segmentation by Application:

Recycling Environment

Food and Pharmaceutical

Acid and Alkali Production

Seawater Desalination

Lithium Extraction

Laboratory

Others

## Companies Profiled:

Veolia

Hangzhou Lanran

PCCell GmbH

Eurodia

Astom

AGC Engineering

MEGA

Shandong Tianwei Membrane Technology

Saltworks Technologies

Electrosynthesis Company

Jiangsu Ritai

WGM Sistemas

Bluestar (Hangzhou)

Hangzhou Createnviro

Xiamen Filter & Membrane Technology

Zhejiang Lanjimo

Shandong Yuxin

Zibo Rikang

Zhejiang Saite

Tianjin Cnclear

Beijing Tingrun

Hebei Jiyuan

Cangzhou Lanhaiyang

**Key Questions Answered:**

1. How big is the global Electrodialysis Systems and Equipment market?
2. What is the demand of the global Electrodialysis Systems and Equipment market?
3. What is the year over year growth of the global Electrodialysis Systems and Equipment market?
4. What is the production and production value of the global Electrodialysis Systems and Equipment market?
5. Who are the key producers in the global Electrodialysis Systems and Equipment market?
6. What are the growth factors driving the market demand?

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