

Global Greywater System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Greywater System market size is expected to reach \$ 2776 million by 2032, rising at a market growth of 5.6% CAGR during the forecast period (2026-2032).

A Greywater System is an onsite water collection, treatment, storage, and reuse system designed to recover relatively low-contamination wastewater generated from sources such as showers, bathtubs, bathroom washbasins, and laundry equipment for non-potable reuse. Depending on system design, greywater may undergo filtration, biological treatment, membrane treatment, disinfection, or a combination of processes before being reused for toilet flushing, landscape irrigation, cooling, cleaning, or other non-potable applications. Toilet wastewater is generally excluded from greywater, although the precise definition of permitted source water varies by jurisdiction.

Key Findings

Greywater System adoption is moving from basic water diversion toward integrated treatment, storage, monitoring, and automated reuse

Treated Reuse System and Advanced Recycling System provide higher value in applications requiring controlled and consistent reuse-water quality

Residential Building Water Reuse and Commercial Complex Water-Saving System are important demand scenarios for decentralized water management

Water scarcity, building efficiency requirements, water reuse standards, and decentralized infrastructure are reshaping long-term market demand

Market Trends

The Greywater System market is evolving from relatively simple collection and reuse arrangements toward integrated treatment platforms combining biological treatment, membrane filtration, disinfection, sensors, automatic controls, storage management, and remote operating functions. Building owners increasingly evaluate systems on the basis of water quality consistency, hygiene assurance, maintenance intensity, space requirements, energy consumption, reliability, and compatibility with building plumbing rather than water-saving capability alone. Certification and standardized performance evaluation are also becoming more important as greywater moves into indoor reuse applications. NSF/ANSI 350 establishes performance requirements for onsite residential and commercial reuse treatment systems, while current commercial systems increasingly emphasize certified treatment quality, modular installation, and automated operation. Equipment suppliers are also extending system designs from individual homes toward multifamily buildings, hotels, schools, sports facilities, and larger commercial developments. The longer-term direction is therefore toward compact, modular, intelligent, and higher-recovery Greywater System platforms that can be incorporated into new building design or deployed as part of water-efficiency retrofits.

Market Dynamics

Drivers

Demand for Greywater System solutions is being supported by increasing pressure on freshwater resources, higher municipal water and wastewater management requirements, green-building strategies, and growing interest in decentralized water infrastructure. Onsite non-potable reuse can reduce freshwater demand while lowering the volume of wastewater discharged to sewer systems, making it particularly relevant for dense buildings and facilities with relatively predictable water consumption. Regulatory and technical frameworks are gradually providing clearer pathways for treated greywater applications such as toilet flushing, irrigation, cleaning, and other non-potable uses. In the United States, multiple states have established onsite non-potable reuse regulations or guidelines, while risk-based treatment and commissioning frameworks continue to develop. These factors strengthen the business case for Greywater System deployment in residential projects, commercial complexes, public institutions, and water-constrained developments.

Restraints

The principal restraints are project economics, plumbing complexity, maintenance requirements, and differences in local reuse regulations. A Greywater System often requires separate collection piping, storage capacity, pumps, treatment equipment, controls, and dedicated reuse-water distribution, which can make retrofit projects more complex than new-build installations. Treatment systems must also maintain reliable microbial and physical water quality under fluctuating inlet flow and contaminant loads, while avoiding odor, fouling, membrane degradation, or deterioration during periods of low usage. Routine servicing and replacement of filtration or treatment components add lifecycle cost. Local requirements regarding allowable greywater sources, permitted end uses, disinfection, monitoring, and water quality can also vary substantially, increasing design and certification complexity for manufacturers and developers operating across multiple markets. These constraints mean that lifecycle economics and ease of operation remain important barriers to broader adoption even where the technical benefits of water reuse are well established.

Opportunities

The strongest opportunities lie in integrating Greywater System solutions into new residential developments, hotels, commercial complexes, campuses, public facilities, and other buildings with simultaneous greywater generation and non-potable water demand. New construction provides an important advantage because separate collection and reuse piping can be incorporated during initial design, reducing retrofit complexity. Modular systems also create opportunities to scale treatment capacity by building size and occupancy, while advanced controls can optimize water balance, tank storage, treatment cycles, and backup freshwater supply. Higher-value opportunities are emerging in Advanced Recycling System configurations that combine treatment, sensing, automated water-quality management, and intelligent control. Decentralized systems may also support resilience applications where centralized water infrastructure is constrained or vulnerable. Product suppliers able to integrate compact equipment design, certified treatment performance, installation engineering, digital monitoring, maintenance services, and building-management connectivity can expand beyond equipment sales toward higher-value lifecycle service models.

Challenges

A key long-term challenge is ensuring consistent treatment performance under highly variable household and building operating conditions. Greywater quantity and quality can fluctuate with occupancy, personal-care products, detergents, cleaning chemicals, temperature, and daily usage patterns, requiring systems to remain stable during both peak flows and extended low-flow periods. Manufacturers must balance treatment effectiveness against equipment footprint, power consumption, maintenance requirements, noise, installation cost, and user convenience. Another challenge is the absence of a single globally harmonized regulatory framework: requirements for permitted source water, treatment quality, plumbing separation, monitoring, and allowable reuse applications differ by jurisdiction. As systems become more digitally controlled, equipment reliability, sensor calibration, fault detection, and service response also become more important. Market development therefore depends not only on treatment technology, but on reducing operating complexity sufficiently for building owners and facility managers to adopt systems as standard infrastructure rather than specialist water-treatment equipment.

Industry Chain Analysis

The upstream industry chain of Greywater System includes treatment membranes, filter media, biological treatment materials, pumps, valves, tanks, piping components, UV and other disinfection equipment, sensors, meters, electronic controllers, electrical components, housings, and water-treatment chemicals where required. Component selection directly affects treatment quality, energy consumption, equipment footprint, maintenance frequency, reliability, and lifecycle cost. Membrane modules, pumps, control systems, sensors, and specialized treatment components represent relatively high-value inputs because they strongly influence water quality and operating stability. Storage tanks and plumbing components are also important because greywater generation and reuse demand rarely occur at exactly the same time, requiring reliable balancing between treatment, storage, freshwater backup, and reuse distribution. Current commercial systems increasingly integrate treatment, storage, pumping, controls, and monitoring into packaged or modular configurations, reducing engineering and commissioning requirements for building projects.

The midstream segment covers system design, process engineering, equipment manufacturing, software and control integration, assembly, installation engineering, testing, commissioning, certification, and after-sales maintenance. Downstream value is created through Residential Building Water Reuse, Commercial Complex Water-Saving System, Public Institution Water Recycling, Landscape & Agricultural Irrigation, and

other onsite water-reuse projects. The economic structure of the industry is influenced not only by treatment equipment cost but also by separate plumbing, civil works, storage, installation, commissioning, compliance, and long-term maintenance. As a result, suppliers with standardized modular systems, established engineering capabilities, simple maintenance requirements, reliable local service, and strong system-integration expertise can capture more value than suppliers focused solely on individual water-treatment components.

Segment Insights

Direct Reuse System represents the simplest Greywater System configuration and is generally suited to applications where source-water quality is relatively predictable and the end use has comparatively limited treatment requirements. Its primary commercial advantage is lower equipment complexity, but application flexibility may be constrained by water-quality requirements and local regulations. Treated Reuse System introduces dedicated treatment processes that improve water quality and expand the potential for controlled reuse within buildings and other developed sites. This category benefits from growing requirements for hygienic quality, system reliability, and formalized non-potable water reuse. Advanced Recycling System represents the higher-value direction of the market, combining multiple treatment barriers with automated controls, monitoring, storage management, and higher recovery capability. Commercial product development indicates that the market is increasingly emphasizing biological treatment, membrane separation, disinfection, sensor-based operation, and packaged modular design to achieve stable water quality while reducing daily user intervention.

From a market-development perspective, the competitive boundary between these segments is increasingly defined by total lifecycle value rather than treatment intensity alone. Direct Reuse System can retain advantages in cost-sensitive and relatively simple applications, while Treated Reuse System is positioned for broader building-scale adoption where water-quality control is required. Advanced Recycling System has greater potential in high-density residential developments, commercial properties, institutional facilities, and locations where maximizing water recovery or reducing dependence on centralized supplies provides additional economic or resilience value. The principal technology opportunity is therefore to deliver higher treatment and recovery performance without proportionally increasing maintenance burden, installation space, energy consumption, or system complexity.

Downstream Market Opportunities

Residential Building Water Reuse provides opportunities where shower, bath, washbasin, or laundry water can be matched with recurring non-potable demand, particularly toilet flushing and irrigation. Commercial Complex Water-Saving System applications can generate stronger system economics where large and relatively stable occupancy creates predictable greywater generation and reuse demand. Public Institution Water Recycling is supported by schools, campuses, sports facilities, hospitals, administrative buildings, and similar properties where water conservation can be integrated with sustainability and facility-management objectives. Landscape & Agricultural Irrigation offers a comparatively direct reuse pathway where local regulations permit appropriate greywater use. The most attractive downstream projects are generally those with balanced generation and reuse profiles, sufficient building scale, high water-use intensity, and the ability to incorporate separate plumbing during project design. Hotels, apartment buildings, sports facilities, and other high-occupancy properties are therefore important commercial targets for system suppliers.

Regional Insights

North America is characterized by expanding technical and regulatory frameworks for onsite non-potable water reuse, although requirements remain decentralized across states and local authorities. The U.S. EPA currently identifies multiple states with regulations or guidelines covering onsite non-potable reuse, while standardized treatment and commissioning frameworks are becoming increasingly established. This supports Greywater System deployment in new developments, multifamily buildings, commercial facilities, and water-stressed urban markets, but jurisdictional differences continue to influence product approval and project design. Europe combines water-efficiency policies, established building standards, and growing interest in decentralized and circular water management. France, for example, has established rules governing certain domestic uses of non-potable water, including greywater, while European projects continue to demonstrate decentralized source separation and local water recovery. Asia-Pacific presents opportunities linked to dense urban development, commercial buildings, water-constrained communities, and localized water resilience. Japan has active development of small-scale decentralized recycling technologies, while the presence of Chinese, Japanese, and Australian suppliers in the industry reflects a diversified regional technology base.

Competitive Landscape Analysis

The Greywater System market has a diversified competitive structure spanning specialized water-reuse technology developers, decentralized wastewater treatment companies, building-water system suppliers, and regional engineering companies. Salher, Hydraloop Systems B.V., BioMicrobics, Inc., SDS Infrastructure, INTEWA GmbH, Ozzi Kleen, Aquacell, DEHOUST GmbH and WOTA Corp. participate through different combinations of packaged systems, biological treatment, membrane treatment, decentralized recycling, controls, and building-integrated water management. Commercial solutions from Hydraloop Systems B.V., INTEWA GmbH and DEHOUST GmbH illustrate the industry's movement toward compact, automated, modular systems for residential and commercial buildings, while WOTA Corp. reflects development toward highly decentralized and intelligent water-circulation technologies. Regional participants such as Shandong Longantai Environmental Protection Sci-tech Co., Ltd., Dunwell Group, Wastewater Australia Pty Ltd. (Garden Master), Matala Water Technology Co., Ltd. (Aqua2use), Daiwa Kasei Co., Ltd., Earthsafe Systems, Inc., SANICON Co., Ltd., NEWater (Suzhou) Environmental Technology Co., Ltd., Filtrific Company LLC (Flotender), Aqua Clarus, ECO Smart Water Technologies CC and Qingzhou Foren Water Treatment Equipment Co., Ltd. broaden competition through localized manufacturing, project engineering, water-treatment expertise, and service networks. Competitive differentiation increasingly depends on treatment reliability, certified water quality, compact footprint, automation, ease of installation, operating cost, maintenance requirements, project engineering, and local technical support rather than equipment price alone.

Report Scope

This report studies the global Greywater System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Greywater System 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 Greywater System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Greywater System total production and demand, 2021-2032, (Units)

Global Greywater System total production value, 2021-2032, (USD Million)

Global Greywater System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Greywater System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Greywater System domestic production, consumption, key domestic manufacturers and share

Global Greywater System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Greywater System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Greywater System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Greywater System 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 Salher, Hydraloop Systems B.V., BioMicrobics, Inc., SDS Infrastructure, INTEWA GmbH, Ozzi Kleen, Aquacell, DEHOUST GmbH, WOTA Corp., Shandong Longantai Environmental Protection Sci-tech Co., Ltd., 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 Greywater System 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 Greywater System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Greywater System Market, Segmentation by Type:

Direct Reuse System

Treated Reuse System

Advanced Recycling System

Global Greywater System Market, Segmentation by Treatment

Technology:

Physical Filtration System

Biological Treatment System

Other

Global Greywater System Market, Segmentation by Rated Treatment Capacity:

Small Capacity (<1,000 L/Day)

Medium Capacity (1,000–5,678 L/Day)

Large Capacity (>5,678 L/Day)

Global Greywater System Market, Segmentation by Application:

Residential Building Water Reuse

Commercial Complex Water-Saving System

Public Institution Water Recycling

Landscape & Agricultural Irrigation

Others

Companies Profiled:

Salher

Hydraloop Systems B.V.

BioMicrobics, Inc.

SDS Infrastructure

INTEWA GmbH

Ozzi Kleen

Aquacell

DEHOUST GmbH

WOTA Corp.

Shandong Longantai Environmental Protection Sci-tech Co., Ltd.

Dunwell Group

Wastewater Australia Pty Ltd. (Garden Master)

Matala Water Technology Co., Ltd. (Aqua2use)

Daiwa Kasei Co., Ltd.

Earthsafe Systems, Inc.

SANICON Co., Ltd.

NEWater (Suzhou) Environmental Technology Co., Ltd.

Filtrific Company LLC (Flotender)

Aqua Clarus

ECO Smart Water Technologies CC

Qingzhou Foren Water Treatment Equipment Co., Ltd.

Key Questions Answered

1. How big is the global Greywater System market?
2. What is the demand of the global Greywater System market?
3. What is the year over year growth of the global Greywater System market?
4. What is the total value of the global Greywater System market?
5. Who are the Major Players in the global Greywater System market?
6. What are the growth factors driving the market demand?

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