

Global Thickening and Clarification Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Thickening and Clarification Equipment market size is expected to reach \$ 631 million by 2032, rising at a market growth of 4.0% CAGR during the forecast period (2026-2032).

Thickening and Clarification Equipment refers to a category of industrial solid-liquid separation equipment designed to separate suspended solids from liquid streams primarily through gravity sedimentation, particle aggregation and controlled solids settling, while simultaneously recovering either a concentrated solids underflow or a clarified liquid overflow depending on the process objective. Although thickeners and clarifiers are based on similar sedimentation principles and often share major components such as tanks, feedwells, flocculant systems, rake mechanisms, drives, overflow launders and underflow discharge systems, their operating objectives are different: thickeners are primarily designed to maximize the solids concentration of the underflow by removing water from slurry, whereas clarifiers focus on minimizing suspended solids in the overflow and producing clarified water suitable for reuse, recycling or subsequent treatment. Depending on feed characteristics and required separation performance, the equipment portfolio may include conventional thickeners, high-rate thickeners, high-density thickeners, high-compression thickeners, paste and deep-cone thickeners, conventional clarifiers, solids-contact clarifiers and inclined-plate clarification systems. Modern systems generally use controlled flocculant or coagulant addition and optimized feedwell designs to accelerate particle aggregation and settling, while automated monitoring of bed level, rake torque, underflow density and flow conditions improves process stability and reduces dependence on manual operation. Thickening and clarification equipment is widely applied in mining and mineral processing, metallurgical processing, hydrometallurgy, chemical processing, fertilizer production, tailings management, industrial wastewater treatment and process-water

recovery, and plays an important role in increasing water recovery, reducing slurry volumes, preparing feed for filtration or paste disposal, and maintaining closed-loop process-water systems. The global annual sales volume of Thickening and Clarification Equipment is estimated at approximately 800–1,500 units, with an average equipment price of around US\$0.4–1.2 million per unit.

The global Thickening and Clarification Equipment market is being shaped by increasing demand for water recovery, tailings dewatering, process-water recycling, higher plant throughput and improved environmental performance across mining, minerals processing and other water-intensive industries. In mining in particular, declining ore grades and the processing of larger material volumes can increase slurry handling and water-management requirements, making efficient solid-liquid separation an increasingly important part of concentrators, hydrometallurgical plants and tailings management systems. Equipment purchasing decisions are therefore shifting beyond basic sedimentation capacity toward higher underflow density, improved overflow clarity, higher solids loading per unit area, reduced flocculant consumption, lower energy use and more stable automated control. Manufacturers such as Metso, FLS, DELKOR and ANDRITZ consequently offer increasingly differentiated portfolios covering high-rate, high-density, high-compression and paste thickening as well as specialized clarification technologies, while also incorporating advanced feedwell design, automated density and mud-level monitoring and digital process control. Water conservation is becoming one of the most important commercial drivers because recovered overflow water can be returned to mineral-processing circuits, reducing freshwater demand and limiting water losses to tailings; paste and high-density thickening also support more concentrated tailings disposal and improved water recovery. At the same time, the market is not limited to greenfield equipment installations. A significant opportunity exists in modernization, retrofit and replacement of installed thickeners and clarifiers, where upgrades to feedwells, drives, rake systems, process controls and flocculant systems can raise capacity and water recovery without replacing the entire tank structure. From a competitive perspective, the market is characterized by high engineering requirements, relatively long equipment service lives and significant customization according to slurry characteristics, settling behavior, required underflow density and site conditions. Future competition is therefore expected to focus increasingly on high-density and paste thickening, more compact high-rate clarification, intelligent process control, predictive maintenance, water-efficiency improvement and integrated tailings-management solutions rather than solely on equipment size or initial purchase price.

Report Scope

This report studies the global Thickening and Clarification Equipment production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Thickening and Clarification Equipment total production and demand, 2021-2032, (Units)

Global Thickening and Clarification Equipment total production value, 2021-2032, (USD Million)

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

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

U.S. VS China: Thickening and Clarification Equipment domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Thickening and Clarification 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 Metso, FLS (FLSmidth), TAKRAF Group (DELKOR), WesTech Engineering, McLanahan Corporation, ANDRITZ, Roytec Global, MIP Process Technologies, TH Company, PHOENIX Process Equipment, 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 Thickening and Clarification Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K 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 Thickening and Clarification Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Thickening and Clarification Equipment Market, Segmentation by Type:

Center-Drive Systems

Peripheral-Drive Systems

Hydraulic-Drive Systems

Global Thickening and Clarification Equipment Market, Segmentation by End-Use Industry:

Tailings Dewatering

Concentrate Dewatering

Process Water Recovery

Counter Current Decantation

Others

Global Thickening and Clarification Equipment Market, Segmentation by Equipment Configuration:

Rake Thickener

Rakeless Thickener

Others

Global Thickening and Clarification Equipment Market, Segmentation by Application:

Mining & Mineral Processing

Metallurgy

Coal Processing

Water & Wastewater Treatment

Others

Companies Profiled:

Metso

FLS (FLSmidth)

TAKRAF Group (DELKOR)

WesTech Engineering

McLanahan Corporation

ANDRITZ

Roytec Global

MIP Process Technologies

TH Company

PHOENIX Process Equipment

Mining and Metallurgical Technology

Hengfengtai Precision Machinery

Feny Corporation

Key Questions Answered

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

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