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Water and Wastewater Treatment Market Assessment, By Chemical Type [Coagulants, Flocculants, Defoamers, Organic Polymers, Reducing Agents, Sludge Conditioners, Biocides & Bio-Dispersants, PH Control, Others], By Water Treatment Process [Sewage Treatment Process, Effluent Treatment Process, Activated Sludge Process, Other], By End-use Industry [Power Generation, Oil & Gas, Chemical Plants, Mining, Municipal, Food & Beverage, Pulp & Paper, Textile, Others], By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

Global water and wastewater treatment market size was valued at USD 317.8 billion in 2022, which is expected to grow to USD 537.9 billion in 2030, with a CAGR of 6.8% during the forecast period between 2023 and 2030. The increasing demand for water and wastewater treatment chemicals in the municipal corporation and the recently developed water treatment plants for the oil & gas sector are the prime factors driving the market growth.

The stringent regulations related to water treatment in industrial settings such as paper & pulp, food & water, and others are prompting the launch of new water and wastewater treatment plants globally to ensure superior sustainability targets, fostering market growth. Furthermore, the increasing environmental concerns related to water constraints are boosting the adoption of wastewater treatment processes. As a result, the demand for water and wastewater treatment chemicals such as PH control,

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biocides, and others is increasing to eliminate the contaminants from water. This, in turn, fosters the growth of the global water and wastewater treatment market.

Increasing Industrial Production Activities is Boosting the Demand

In industrial manufacturing facilities, the utilization of water and wastewater treatment is vital to optimizing various water-based industrial processes, including cooling, rinsing, processing, and others. The increasing automation processes in manufacturing units and rising sustainability-compliant industrial production are the key trends driving industrial manufacturing growth.

For instance, according to the United States Energy Information Administration (EIA), in 2021 global liquid fuel production was 95.71 million barrels per day, and in 2022, it was 99.88 million barrels per day. In 2022, the annual growth rate of oil product manufacturing was 4.36%. Thus, the increasing industrial manufacturing activities related to oil & gas, mining, heavy equipment, and others fuel the demand for water and wastewater treatment chemicals to efficiently remove hazardous substances and contaminants, propelling the market growth.

Stringent Regulations Associated with Water and Wastewater Treatment

The prevalence of stringent regulations makes it mandatory to treat water and wastewater to ensure superior environmental compliance. Moreover, adopting stringent government regulations in various countries provides the deployment of treated water in industrial processes such as cleaning, processing, etc.

For instance, Directive 91/271/EEC is a European Commission regulation, which mandates the collection, efficient treatment, and discharge of urban wastewater from several industrial sectors. Hence, the compulsory stringent regulations for wastewater treatment are accelerating the demand for chemicals such as PH control and biocides to remove the traces of bacteria. As a result, the stringent government regulations for water treatment are favouring market growth.

Recently Launched Wastewater Plants

The prime benefits of water and wastewater treatment include minimum odor control, easy breakdown of contaminants, and efficient chemical disinfectants. As a result, water and wastewater treatment eliminate disease-causing bacteria. The launch of new wastewater treatment plants is increasing globally to ensure significant compliance with

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regulatory norms and efficient use of treated water.

For instance, in September 2022, LANXESS launched a new wastewater treatment plant of USD 12.65 million (EURO 12 million) in Belgium. The wastewater treatment plant has a processing capacity of 260,000 liters per hour. Therefore, the recently launched wastewater treatment plants at the global level are spurring the demand for water and wastewater treatment chemicals to ensure efficient reuse of water, which is supplementing the market growth.

Impact of COVID-19

The restrictions imposed due to the COVID-19 pandemic in 2020 significantly impacted the construction of new water and wastewater treatment projects. For instance, in April 2020, the construction of a sewage treatment plant in Naples was halted due to the imposition of social distancing norms. Thus, the halt in the construction of water and wastewater treatment plants resulted in a decline in the revenue growth of the market in 2020.

However, the ease of COVID-19-related regulation by the end of 2020 led to improved market conditions. Likewise, in the coming years, it is anticipated that the impact of the COVID-19 pandemic will be negligible, which is expected to register growth prospects in the water and wastewater treatment market outlook during the projected forecast period.

Impact of Russia-Ukraine War

Russia is a prominent country in industrial manufacturing activities. The industries such as mining, chemicals, oil & gas, and others are the major contributors to the economic growth of Russia. The Russia-Ukraine war impacted the production of industrial products in Russia, Ukraine, and several European countries. Thus, the demand for water and wastewater will decline in the first half of 2022 in countries such as Russia, Ukraine, Poland, and others.

For instance, in February 2022, major food & beverage manufacturers in Ukraine, including Brewer Japan Tobacco, Carlsberg, Coca-Cola bottler, and others halted their production operations there. Thus, the halt in industrial manufacturing activities due to Russia's invasion on Ukraine posed a bottleneck for water and wastewater treatment in the first half of 2022.

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Key Players Landscape and Outlook

The key market players in the water and wastewater treatment market include BASF SE, Dow, Solvay, and Ecolab, and others, equipped with state-of-the-art manufacturing facilities to ensure product requirements as per the end-use industries' demand. The prominent players involved in water and wastewater treatment manufacturing are investing in strategies such as new product innovation, acquisitions, and others to increase their market share in the water and wastewater treatment industry.

For instance, in March 2023, Xylem acquired Evoqua Water Technologies for USD 7.5 billion. The focus of the acquisition was to increase the market position of Xylem in the global water and wastewater treatment market.

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