

Data Center Water & Wastewater Treatment Equipment Market by Data Center Type (Hyperscale, Colocation, Enterprise), By Equipment Type, By Treatment Stage (Pretreatment & Purification, Cooling Water Treatment), and Region - Global Forecast to 2031

<https://marketpublishers.com/r/DF2394D30571EN.html>

Date: July 2026

Pages: 284

Price: US\$ 4,950.00 (Single User License)

ID: DF2394D30571EN

Abstracts

The global data center water & wastewater treatment equipment market is projected to grow from USD 3.30 billion in 2026 to USD 5.90 billion by 2031, registering a CAGR of 12.3% during the forecast period.

The water and wastewater treatment equipment market for data centers is experiencing rapid growth due to rising data center construction, increased water use for cooling, and a shift towards sustainability. This market offers products such as chemical treatment and conditioning systems, membranes and high-purity water devices, filtration units, disinfection tools, and wastewater treatment solutions. These technologies enhance cooling efficiency, ensure water quality, and enable water reuse. While data centers traditionally focused mainly on energy efficiency, water efficiency has become equally vital due to regulatory pressures and regional water scarcity affecting businesses and consumers. The market's growth is expected to accelerate further, driven by the expansion of hyperscale and AI-focused data centers, increased adoption of liquid cooling, and greater investments in closed-loop water systems, wastewater recycling, and digital water management platforms.

“By equipment type, the chemical treatment & conditioning systems segment is anticipated to account for the largest market share during the forecast period.”

Chemical treatment & conditioning systems are expected to be the largest equipment type segment due to their critical role in maintaining cooling system performance, reliability, and operational efficiency. Data centers rely heavily on cooling water systems, in which chemical treatment is essential to control corrosion, scaling, microbial growth, and contamination that can impair heat transfer efficiency and damage equipment. These systems are widely adopted across hyperscale, colocation, enterprise, and edge data centers because they can be integrated with existing cooling infrastructure and provide continuous water quality management. Additionally, the growing deployment of cooling towers, chilled water systems, and liquid cooling technologies is increasing demand for advanced chemical conditioning solutions. The need to minimize maintenance costs, extend equipment lifespan, and ensure uninterrupted data center operations further supports this segment's dominance.

By treatment stage, the cooling water treatment segment is anticipated to account for the largest market share during the forecast period.

Cooling water treatment is expected to be the largest segment by treatment stage in the data center water & wastewater treatment equipment market due to the critical role of cooling systems in maintaining data center reliability and operational efficiency. Data centers consume significant amounts of water for cooling applications, particularly in cooling towers, chilled water systems, and advanced liquid cooling infrastructure. Effective water treatment is essential to prevent scaling, corrosion, biological growth, and contamination that can reduce cooling performance and damage critical equipment. The rapid expansion of hyperscale and AI-driven data centers, which generate higher heat loads, is increasing demand for advanced cooling water treatment solutions. Additionally, the growing emphasis on water efficiency, regulatory compliance, and optimized cooling operations is encouraging operators to invest in chemical treatment, filtration, monitoring, and water-conditioning technologies, making cooling water treatment the dominant market segment.

“North America is anticipated to account for the largest market share during the forecast period.

North America leads as the largest regional market, driven by a highly advanced data center ecosystem. Numerous massive, multi-tenant data centers, known as hyperscale facilities, are being constructed by major cloud service providers worldwide. The surge in data generated by artificial intelligence (AI), cloud computing, digital services, and high-performance computing is fueling the expansion of data centers in North America, especially in the United States. As

these facilities grow in size and number, concerns about their water consumption increase. In response, many data center operators are adopting advanced wastewater treatment, recycling, and reuse systems. Stricter environmental regulations and corporate commitments to sustainability are also prompting investments in new water management technologies, which can be costly both in capital and operating expenses. Most key water technology companies—either integrated treatment solution providers or specialized equipment manufacturers—are expected to continue driving market growth. Moreover, as more data centers adopt liquid cooling for AI applications, demand for water management systems will rise.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from key organizations operating in the data center water & wastewater treatment equipment market, and secondary research was used to determine and verify the market size of several segments.

By Company Type: Tier 1 – 50%, Tier 2 – 30%, and Tier 3 – 20%

By Designation: Managers – 15%, Directors – 20%, and Others – 65%

By Region: North America – 40%, Europe – 25%, Asia Pacific – 28%, Rest of the World - 7%.

The data center water & wastewater treatment equipment market comprises major companies, such as Veolia (France), Ecolab Inc. (US), Xylem (US), Solenis (US), Saltworks Technologies Inc. (Canada), Aquatech International LLC (US), Kurita America Inc. (US), Gradiant (US), Lenntech B.V. (Netherlands), and IDE (Israel). The study includes in-depth competitive analysis of these key players in the data center water & wastewater treatment equipment market, with their company profiles, recent developments, and key market strategies.

Research Coverage

This report segments the market for data center water & wastewater treatment equipment market on the basis of equipment type, treatment stage, data center type, and region, and provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been

conducted to provide insights into their business overviews, products & services, key strategies, and expansions associated with the data center water & wastewater treatment equipment market.

Key Benefits of Buying this Report

This research report is focused on various levels of analysis—industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape; emerging and high-growth segments of the data center water & wastewater treatment equipment market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights into the following points:

Analysis of drivers (hyperscale data center expansion accelerates demand for water treatment infrastructure, AI and high-density computing drive demand for advanced cooling water treatment solutions, growing cloud computing and digital transformation drive data center construction activity, etc.), **restraints** (high capital expenditure requirements restrain adoption of advanced treatment systems, complexity of retrofitting treatment systems into existing data centers, lengthy permitting and approval processes delay infrastructure projects), **opportunities** (water reuse & recovery investments create new growth opportunities, adoption of alternative water sources expands demand for advanced treatment equipment, expansion of colocation facilities expands addressable market for treatment equipment), and **challenges** (water scarcity and local resource constraints impact data center development, rising energy and operating costs affect total cost of water treatment operations) influencing the growth of the market

Market Penetration: Comprehensive information on the data center water & wastewater treatment equipment offered by top players in the global data center water & wastewater treatment equipment market

Product Development/Innovation: Detailed insights on upcoming technologies, product launches, expansions, and acquisitions in the market

Market Development: Comprehensive information about lucrative emerging markets; the report analyzes the market across several regions.

Market Capacity: Production capacity of the companies is provided wherever available, with upcoming capacities for the market

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the data center water & wastewater treatment equipment market

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