

PFAS Filtration Market by Technology (Water Treatment Systems, Water Treatment Chemicals), Place of Treatment (In-Situ, Ex-Situ), Remediation Technology, Environmental Medium, Contaminant Type, and Region - Global Forecast to 2029

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Abstracts

The PFAS filtration market is projected to reach USD 2.8 billion by 2029, at a CAGR of 7.1% from USD 2.0 billion in 2024. The industrial expansion across various sectors in the US, including manufacturing, semiconductor, and chemical processing, has led to an increased utilization of PFAS-containing substances. For instance, in the manufacturing sector, PFAS compounds are commonly found in products like non-stick coatings, food packaging, and firefighting foams. According to the U.S. Environmental Protection Agency (EPA), the manufacturing industry is one of the primary sources of PFAS contamination, contributing to water pollution through wastewater discharge. Recent data from the EPA indicates that over 1,500 facilities across the United States are known or suspected of using PFAS in their operations, resulting in significant environmental impact.

The semiconductor industry extensively employs PFAS-containing chemicals in various manufacturing processes, such as etching and cleaning agents. Similarly, the chemical processing industry relies on PFAS compounds for their unique properties, using them in applications like lubricants, surfactants, and stain repellents. According to recent data from the EPA and industry reports, the manufacturing sector in the US accounts for a significant portion of PFAS emissions into the environment, with estimates suggesting that thousands of facilities across the country use PFAS-containing substances in their operations. Moreover, the semiconductor industry, which plays a crucial role in technology manufacturing, relies on PFAS chemicals for various processes. The chemical processing industry contributes to PFAS contamination through its use of

these substances in manufacturing processes and product formulations. As these industries expand, there is a growing need to address the environmental impact of PFAS contamination. Regulatory standards set by agencies such as the EPA and state-level environmental authorities necessitate stringent measures to mitigate PFAS pollution. Consequently, there is an increasing demand for PFAS filtration systems within these industries to comply with regulatory requirements and ensure environmental sustainability. PFAS treatment becomes imperative to prevent the release of these persistent and harmful contaminants into the environment, safeguarding water resources and public health.

“Based on Technology type, water treatment systems segment is expected to be the fastest growing market during the forecast period, in terms of value.”

Water treatment systems for PFAS filtration utilize several advanced technologies to effectively remove these persistent chemicals from water sources. Reverse Osmosis (RO) employs semipermeable membranes to physically block PFAS molecules based on their size and charge, ensuring high removal efficiency. Similarly, High-Pressure Membrane Filtration methods like nanofiltration and ultrafiltration operate on the principle of excluding contaminants through membranes, targeting PFAS effectively. Advanced Oxidation Processes (AOPs), such as ozone or hydrogen peroxide treatments, degrade PFAS molecules into less harmful components through oxidation reactions, though these processes can be complex and costly. Electrochemical Oxidation/Reduction techniques apply electric currents to water, breaking down PFAS molecules into less toxic substances, showcasing potential as a promising yet evolving method. Each of these technologies offers distinct advantages depending on factors like water quality, scale of treatment, and regulatory requirements, highlighting the need for tailored solutions in combating PFAS contamination effectively.

“Based on remediation technology, activated carbon has the largest market share during the forecast period, in terms of value.”

Activated carbon is pivotal in PFAS filtration due to its exceptional ability to adsorb these persistent chemicals from water. PFAS molecules, known for their hydrophobic nature, are attracted to the porous surface of activated carbon, where they adhere through physical forces such as Van der Waals interactions. This adsorption process effectively traps PFAS contaminants within the carbon structure, removing them from the water stream. Activated carbon filtration systems are widely used across various

scales, from municipal treatment plants to household filters, offering reliable removal of PFAS like PFOA and PFOS. Moreover, the regenerative nature of activated carbon allows for prolonged use and cost-effectiveness, making it a preferred choice in combating PFAS contamination in drinking water and industrial processes alike.

“Based on region, Asia Pacific is the fastest growing market for PFAS filtration in 2023, in terms of value.”

The Asia-Pacific region is experiencing rapid growth in PFAS filtration primarily due to several factors. Firstly, industrialization and urbanization across countries in this region have led to increased chemical usage and manufacturing activities, which in turn contribute to higher levels of PFAS contamination in water sources. As awareness of environmental and health risks associated with PFAS grows, there is a greater demand for effective water treatment solutions. Additionally, regulatory frameworks in countries like China, India, and Australia are becoming more stringent regarding water quality standards, necessitating the adoption of advanced filtration technologies like activated carbon and membrane processes for PFAS removal. The region's economic growth has also enabled investment in water infrastructure, including modern filtration technologies, to meet these regulatory requirements and address public health concerns.

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees are as follows:

By Company Type: Tier 1 - 35%, Tier 2 - 45%, and Tier 3 - 20%

By Designation: C-Level - 35%, Director Level - 25%, and Others - 40%

By Region: North America - 40%, Europe - 30%, Asia Pacific - 20%, Middle East & Africa-5%, and Latin America-5%

The key players in this market are Veolia (France), AECOM (US), WSP (Canada), Clean Earth (US), Wood (UK), Xylem (US), Jacobs (US), TRC Companies, Inc. (US), Battelle Memorial Institute (US), Cyclopure, Inc. (US).

Research Coverage

PFAS Filtration Market by Technology (Water Treatment Systems, Water Treatment Chemicals), Place of Treatment...

This report segments the PFAS filtration market based on technology, remediation technology, place of treatment, service type, environmental medium, contaminant type, end-use industry, 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 and services, key strategies, new product launches, expansions, and mergers and acquisitions associated with the PFAS filtration market.

Key benefits of buying this report

This research report focuses on various levels of analysis, including 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 PFAS filtration market, high-growth regions, and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers (Increasing regulatory scrutiny and tightening of environmental regulations regarding PFAS contamination, Growing public awareness of the health risks associated with PFAS exposure, The expansion of manufacturing, chemical processing and semiconductor industry), restraints (Expensive and complex remediation process,), opportunities (US PFAS treatment firms have significant potential to expand globally into markets grappling with increasing PFAS contamination, Significant government funding and support for PFAS research, development, and remediation efforts) and challenges (Proper management of treatment residuals generated during PFAS treatment, Addressing emerging PFAS compounds and understanding their potential risks and treatment requirements presents ongoing challenges for the industry.).

Market Penetration: Comprehensive information on the PFAS filtration market offered by top players in the global PFAS filtration market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the PFAS filtration market.

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for PFAS filtration market across regions.

Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global PFAS filtration market

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the PFAS filtration market

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 INCLUSIONS & EXCLUSIONS

TABLE 1 PFAS FILTRATION MARKET: INCLUSIONS & EXCLUSIONS

1.4 STUDY SCOPE

1.4.1 MARKETS COVERED

1.4.2 REGIONS COVERED

1.4.3 YEARS CONSIDERED

1.5 CURRENCY CONSIDERED

1.6 UNIT CONSIDERED

1.7 STAKEHOLDERS

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 1 PFAS FILTRATION MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Key data from primary sources

2.1.2.2 Breakdown of interviews with experts

2.1.2.3 Key industry insights

2.2 MARKET SIZE ESTIMATION

2.2.1 TOP-DOWN APPROACH

FIGURE 2 TOP-DOWN APPROACH

2.2.2 BOTTOM-UP APPROACH

FIGURE 3 BOTTOM-UP APPROACH

2.3 DATA TRIANGULATION

FIGURE 4 PFAS FILTRATION MARKET: DATA TRIANGULATION

2.4 RESEARCH ASSUMPTIONS

2.5 RESEARCH LIMITATIONS

2.6 FORECAST ESTIMATION

2.6.1 SUPPLY-SIDE APPROACH

2.6.2 DEMAND-SIDE APPROACH

2.7 RECESSION IMPACT

3 EXECUTIVE SUMMARY

FIGURE 5 WATER TREATMENT SYSTEMS TO BE LARGER TECHNOLOGY TYPE BETWEEN 2024 AND 2029

FIGURE 6 ACTIVATED CARBON TO LEAD PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

FIGURE 7 PFOA & PFOS CONTAMINANT TYPE TO LEAD PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

FIGURE 8 GROUNDWATER ENVIRONMENTAL MEDIUM TYPE TO LEAD PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

FIGURE 9 EX-SITU TO LEAD PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

FIGURE 10 OFF-SITE TO LEAD PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

FIGURE 11 MUNICIPAL TO LEAD PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

FIGURE 12 NORTH AMERICA TO LEAD PFAS FILTRATION MARKET, 2024–2029

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN PFAS FILTRATION MARKET

FIGURE 13 EMERGING ECONOMIES TO WITNESS HIGHER DEMAND FOR PFAS FILTRATION PRODUCTS DURING FORECAST PERIOD

4.2 PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE

FIGURE 14 WATER TREATMENT SYSTEMS TO BE FASTER-GROWING MARKET DURING FORECAST PERIOD

4.3 PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY

FIGURE 15 RO MEMBRANE & NANOFILTRATION TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

4.4 PFAS FILTRATION MARKET, BY PLACE OF TREATMENT

FIGURE 16 PFAS MULTIPLE COMPOUNDS TO GROW AT HIGHER CAGR DURING FORECAST PERIOD

4.5 PFAS FILTRATION MARKET, BY SERVICE TYPE

FIGURE 17 ON-SITE SERVICE TYPE TO GROW AT HIGHER CAGR DURING FORECAST PERIOD

4.6 PFAS FILTRATION MARKET, BY ENVIRONMENTAL MEDIUM

FIGURE 18 SOIL REMEDIATION TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

4.7 PFAS FILTRATION MARKET, BY CONTAMINANT TYPE

FIGURE 19 EX-SITU TREATMENT TO GROW AT HIGHER CAGR DURING FORECAST PERIOD

4.8 PFAS FILTRATION MARKET, BY END-USE INDUSTRY

FIGURE 20 INDUSTRIAL SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

4.9 PFAS FILTRATION MARKET, BY COUNTRY

FIGURE 21 MARKET IN AUSTRALIA TO REGISTER HIGHEST CAGR FROM 2024 TO 2029

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 22 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN PFAS FILTRATION MARKET

5.2.1 DRIVERS

5.2.1.1 Increasing regulatory scrutiny and tightening of environmental regulations regarding PFAS contamination

5.2.1.2 Growing public awareness of health risks associated with PFAS exposure

5.2.1.3 Expansion of manufacturing, chemical processing, and semiconductor industries

5.2.2 RESTRAINTS

5.2.2.1 Expensive and complex filtration process

5.2.2.2 Limited availability of trained professionals

5.2.3 OPPORTUNITIES

5.2.3.1 Significant potential to expand globally

5.2.3.2 Significant government funding and support for PFAS research, development, and filtration efforts

5.2.4 CHALLENGES

5.2.4.1 Proper management of treatment residuals generated during PFAS treatment

5.2.4.2 Addressing emerging PFAS compounds and understanding their potential risks and treatment requirements

5.3 VALUE CHAIN ANALYSIS

FIGURE 23 VALUE CHAIN ANALYSIS

5.3.1 RAW MATERIAL SUPPLIERS

5.3.2 R&D COMPANIES AND ORGANIZATIONS

5.3.3 WATER TREATMENT CHEMICALS/SYSTEM SUPPLIERS

5.3.4 WATER TREATMENT SERVICE PROVIDERS

5.3.5 END USERS

5.4 PORTER'S FIVE FORCES ANALYSIS

FIGURE 24 PFAS FILTRATION MARKET: PORTER'S FIVE FORCES ANALYSIS

5.4.1 THREAT OF NEW ENTRANTS

5.4.2 THREAT OF SUBSTITUTES

5.4.3 BARGAINING POWER OF SUPPLIERS

5.4.4 BARGAINING POWER OF BUYERS

5.4.5 INTENSITY OF COMPETITIVE RIVALRY

TABLE 2 PFAS FILTRATION MARKET: PORTER'S FIVE FORCES ANALYSIS

5.5 PATENT ANALYSIS

5.5.1 METHODOLOGY

5.5.2 DOCUMENT TYPES

FIGURE 25 GRANTED PATENTS

5.5.3 PUBLICATION TRENDS IN LAST 10 YEARS

5.5.4 INSIGHTS

5.5.5 JURISDICTION ANALYSIS

5.5.6 TOP 10 PATENT OWNERS IN LAST 10 YEARS

5.6 ECOSYSTEM/MARKET MAP

FIGURE 26 PFAS FILTRATION MARKET ECOSYSTEM

TABLE 3 PFAS FILTRATION: ECOSYSTEM

5.7 TRADE ANALYSIS

5.7.1 IMPORT SCENARIO OF MACHINERY AND APPARATUS FOR FILTERING OR PURIFYING WATER

FIGURE 27 IMPORT OF MACHINERY AND APPARATUS FOR FILTERING OR PURIFYING WATER, BY KEY COUNTRY, 2019–2023

5.7.2 EXPORT SCENARIO OF MACHINERY AND APPARATUS FOR FILTERING OR PURIFYING WATER

FIGURE 28 EXPORT OF MACHINERY AND APPARATUS FOR FILTERING OR PURIFYING WATER, BY KEY COUNTRY, 2019–2023

5.8 MACROECONOMIC OVERVIEW AND KEY TRENDS

5.8.1 GDP TRENDS AND FORECASTS

TABLE 4 PROJECTED REAL GDP GROWTH (ANNUAL PERCENTAGE CHANGE) OF KEY COUNTRIES, 2023–2029

5.9 TECHNOLOGY ANALYSIS

5.9.1 COATED SAND

5.9.2 FOAM FRACTIONATION

5.9.3 MODIFIED CLAY TECHNOLOGY

5.9.4 ZEOLITE & CLAY MINERALS

5.10 TARIFF & REGULATORY LANDSCAPE

5.10.1 REGULATIONS

5.10.1.1 North America

5.10.1.2 Europe

5.10.1.3 Asia Pacific

5.10.1.4 Middle East & Africa and South America

5.11 TRENDS/DISRUPTIONS IMPACTING CUSTOMER'S BUSINESS

FIGURE 29 TRENDS/DISRUPTIONS IMPACTING CUSTOMER'S BUSINESS IN PFAS FILTRATION MARKET

5.12 KEY CONFERENCES & EVENTS IN 2024–2025

TABLE 5 PFAS FILTRATION MARKET: KEY CONFERENCES & EVENTS, 2024–2025

5.13 KEY STAKEHOLDERS & BUYING CRITERIA

FIGURE 30 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP 3 END-USE INDUSTRIES

5.13.1 KEY STAKEHOLDERS IN BUYING PROCESS

TABLE 6 INFLUENCE OF INSTITUTIONAL BUYERS ON BUYING PROCESS FOR TOP 3 END-USE INDUSTRIES

5.13.2 BUYING CRITERIA

5.13.2.1 Quality

5.13.2.2 Service

FIGURE 31 SUPPLIER SELECTION CRITERION

TABLE 7 KEY BUYING CRITERIA FOR TOP 3 END-USE INDUSTRIES

5.14 CASE STUDY ANALYSIS

5.14.1 VEOLIA

5.14.2 EVOQUA WATER TECHNOLOGIES

5.14.3 CALGON CARBON CORPORATION

5.15 INVESTMENT AND FUNDING SCENARIO

FIGURE 32 INVESTMENT AND FUNDING SCENARIO

5.16 FUNDING, BY USE-CASE/APPLICATION

FIGURE 33 FUNDING, BY USE-CASE APPLICATION

6 PFAS FILTRATION MARKET, BY CONTAMINANT TYPE

6.1 INTRODUCTION

FIGURE 34 PFOA & PFOS SEGMENT TO DRIVE PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

TABLE 8 PFAS FILTRATION MARKET, BY CONTAMINANT TYPE, 2021–2023 (USD MILLION)

TABLE 9 PFAS FILTRATION MARKET, BY CONTAMINANT TYPE, 2024–2029 (USD MILLION)

6.2 PFOA & PFOS

6.2.1 SIGNIFICANT PUBLIC HEALTH RISKS ASSOCIATED WITH PRESENCE IN ENVIRONMENT TO DRIVE MARKET

6.3 MULTIPLE PFAS COMPOUNDS

6.3.1 STRINGENT REGULATORY RESPONSE TO DRIVE MARKET

TABLE 10 US STATE GUIDELINE VALUES FOR PFBS

7 PFAS FILTRATION MARKET, BY END-USE INDUSTRY

7.1 INTRODUCTION

FIGURE 35 MUNICIPAL SEGMENT TO DRIVE PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

TABLE 11 PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 12 PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

TABLE 13 PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (KILOTON)

TABLE 14 PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (KILOTON)

7.2 INDUSTRIAL

7.2.1 OIL & GAS

7.2.1.1 Stringent environmental regulations to drive market

7.2.2 PHARMACEUTICAL

7.2.2.1 Growing awareness of health and environmental impacts of PFAS contamination to drive demand

7.2.3 CHEMICAL MANUFACTURING

7.2.3.1 Expanding chemical manufacturing sector to drive market

7.2.4 MINING AND MINERAL PROCESSING

7.2.4.1 Growing mining industry, coupled with stringent regulations regarding discharge, to drive market

7.2.5 OTHER INDUSTRIAL SEGMENTS

7.3 COMMERCIAL

7.3.1 ACTIVATED CARBON AND ION EXCHANGE ARE EFFECTIVE METHODS FOR PFAS FILTRATION IN COMMERCIAL SEGMENT

7.4 MUNICIPAL

7.4.1 DRINKING WATER TREATMENT

7.4.1.1 Stringent environmental regulations related to drinking water to drive market

7.4.2 WASTEWATER TREATMENT

7.4.2.1 Growing public concern to drive market

8 PFAS FILTRATION MARKET, BY ENVIRONMENTAL MEDIUM

8.1 INTRODUCTION

FIGURE 36 GROUNDWATER SEGMENT TO LEAD PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

TABLE 15 PFAS FILTRATION MARKET, BY ENVIRONMENTAL MEDIUM, 2021–2023 (USD MILLION)

TABLE 16 PFAS FILTRATION MARKET, BY ENVIRONMENTAL MEDIUM, 2024–2029 (USD MILLION)

8.2 GROUNDWATER REMEDIATION

8.2.1 STRINGENT FEDERAL AND STATE REGULATIONS TO DRIVE MARKET

8.3 SOIL REMEDIATION

8.3.1 EFFECTIVE ELIMINATION OR NEUTRALIZATION OF PFAS CONTAMINATES TO DRIVE MARKET

8.4 SURFACE WATER AND SEDIMENT REMEDIATION

8.4.1 INCREASING AWARENESS OF PFAS CONTAMINATION TO BOOST MARKET

9 PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY

9.1 INTRODUCTION

FIGURE 37 ACTIVATED CARBON SEGMENT TO DRIVE PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

TABLE 17 PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2021–2023 (USD MILLION)

TABLE 18 PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (USD MILLION)

TABLE 19 PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2021–2023 (KILOTON)

TABLE 20 PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (KILOTON)

9.2 MEMBRANES

9.2.1 ADOPTION OF MEMBRANE TECHNOLOGIES DRIVEN BY STRINGENT ENVIRONMENTAL REGULATIONS

9.2.2 RO MEMBRANES

9.3 CHEMICALS

9.3.1 COST-EFFECTIVE FOR LARGE-SCALE REMEDIATION

- 9.3.2 ACTIVATED CARBON ADSORPTION
- 9.3.3 CHEMICAL OXIDATION
- 9.3.4 ION EXCHANGE RESIN
- 9.3.5 BIOREMEDIATION
- 9.3.6 OTHER REMEDIATION TECHNOLOGIES

10 PFAS FILTRATION MARKET, BY SERVICE TYPE

10.1 INTRODUCTION

FIGURE 38 OFF-SITE SEGMENT TO DRIVE PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

TABLE 21 PFAS FILTRATION MARKET, BY SERVICE TYPE, 2021–2023 (USD MILLION)

TABLE 22 PFAS FILTRATION MARKET, BY SERVICE TYPE, 2024–2029 (USD MILLION)

10.2 ON-SITE

- 10.2.1 IMMEDIACY AND CONVENIENCE TO DRIVE DEMAND

10.3 OFF-SITE

10.3.1 SUITABILITY FOR MUNICIPAL & INDUSTRIAL END-USE INDUSTRIES TO DRIVE MARKET

11 PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE

11.1 INTRODUCTION

FIGURE 39 WATER TREATMENT SYSTEMS SEGMENT TO LEAD PFAS FILTRATION MARKET BETWEEN 2024 AND 2029

TABLE 23 PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE, 2021–2023 (USD MILLION)

TABLE 24 PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE, 2024–2029 (USD MILLION)

11.2 WATER TREATMENT SYSTEMS

11.2.1 ACTIVATED CARBON FILTERS SUITABLE FOR LARGE-SCALE WATER TREATMENT APPLICATIONS

11.3 WATER TREATMENT CHEMICALS

11.3.1 TECHNOLOGICAL ADVANCEMENTS IN WATER TREATMENT CHEMICALS TO DRIVE MARKET

12 PFAS FILTRATION MARKET, BY REGION

12.1 INTRODUCTION

TABLE 25 PFAS FILTRATION MARKET, BY REGION, 2021–2023 (USD MILLION)

TABLE 26 PFAS FILTRATION MARKET, BY REGION, 2024–2029 (USD MILLION)

TABLE 27 PFAS FILTRATION MARKET, BY REGION, 2021–2023 (KILOTON)

TABLE 28 PFAS FILTRATION MARKET, BY REGION, 2024–2029 (KILOTON)

12.2 NORTH AMERICA

12.2.1 RECESSION IMPACT

FIGURE 40 NORTH AMERICA: PFAS FILTRATION MARKET SNAPSHOT

TABLE 29 NORTH AMERICA: PFAS FILTRATION MARKET, BY COUNTRY, 2021–2023 (USD MILLION)

TABLE 30 NORTH AMERICA: PFAS FILTRATION MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 31 NORTH AMERICA: PFAS FILTRATION MARKET, BY COUNTRY, 2021–2023 (KILOTON)

TABLE 32 NORTH AMERICA: PFAS FILTRATION MARKET, BY COUNTRY, 2024–2029 (KILOTON)

TABLE 33 NORTH AMERICA: PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE, 2021–2023 (USD MILLION)

TABLE 34 NORTH AMERICA: PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE, 2024–2029 (USD MILLION)

TABLE 35 NORTH AMERICA: PFAS FILTRATION MARKET, BY CONTAMINANT TYPE, 2021–2023 (USD MILLION)

TABLE 36 NORTH AMERICA: PFAS FILTRATION MARKET, BY CONTAMINANT TYPE, 2024–2029 (USD MILLION)

TABLE 37 NORTH AMERICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2021–2023 (USD MILLION)

TABLE 38 NORTH AMERICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (USD MILLION)

TABLE 39 NORTH AMERICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2021–2023 (KILOTON)

TABLE 40 NORTH AMERICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (KILOTON)

TABLE 41 NORTH AMERICA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 42 NORTH AMERICA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

TABLE 43 NORTH AMERICA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY TYPE, 2021–2023 (KILOTON)

TABLE 44 NORTH AMERICA: PFAS FILTRATION MARKET, BY END-USE

INDUSTRY TYPE, 2024–2029 (KILOTON)**12.2.2 US**

12.2.2.1 Stringent regulations on PFAS contamination to drive market

TABLE 45 US: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 46 US: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.2.3 CANADA

12.2.3.1 Rising government initiatives for PFAS removal to drive market

TABLE 47 CANADA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 48 CANADA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.2.4 MEXICO

12.2.4.1 Increasing demand across industries to drive market

TABLE 49 MEXICO: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 50 MEXICO: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.3 EUROPE**12.3.1 RECESSION IMPACT**

FIGURE 41 EUROPE: PFAS FILTRATION MARKET SNAPSHOT

TABLE 51 EUROPE: PFAS FILTRATION MARKET, BY COUNTRY, 2021–2023 (USD MILLION)

TABLE 52 EUROPE: PFAS FILTRATION MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 53 EUROPE: PFAS FILTRATION MARKET, BY COUNTRY, 2021–2023 (KILOTON)

TABLE 54 EUROPE: PFAS FILTRATION MARKET, BY COUNTRY, 2024–2029 (KILOTON)

TABLE 55 EUROPE: PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE, 2021–2023 (USD MILLION)

TABLE 56 EUROPE: PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE, 2024–2029 (USD MILLION)

TABLE 57 EUROPE: PFAS FILTRATION MARKET, BY CONTAMINANT TYPE, 2021–2023 (USD MILLION)

TABLE 58 EUROPE: PFAS FILTRATION MARKET, BY CONTAMINANT TYPE, 2024–2029 (USD MILLION)

TABLE 59 EUROPE: PFAS FILTRATION MARKET, BY REMEDIATION

TECHNOLOGY, 2021–2023 (USD MILLION)

TABLE 60 EUROPE: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (USD MILLION)

TABLE 61 EUROPE: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2021–2023 (KILOTON)

TABLE 62 EUROPE: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (KILOTON)

TABLE 63 EUROPE: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 64 EUROPE: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

TABLE 65 EUROPE: PFAS FILTRATION MARKET, BY END-USE INDUSTRY TYPE, 2021–2023 (KILOTON)

TABLE 66 EUROPE: PFAS FILTRATION MARKET, BY END-USE INDUSTRY TYPE, 2024–2029 (KILOTON)

12.3.2 GERMANY

12.3.2.1 Rising demand from end-use industries to fuel market growth

TABLE 67 GERMANY: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 68 GERMANY: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.3.3 FRANCE

12.3.3.1 Growing focus on adherence to EU drinking water regulations to drive demand

TABLE 69 FRANCE: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 70 FRANCE: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.3.4 UK

12.3.4.1 Universities and government are funding PFAS removal projects

TABLE 71 UK: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 72 UK: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.3.5 REST OF EUROPE

TABLE 73 REST OF EUROPE: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 74 REST OF EUROPE: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.4 ASIA PACIFIC

12.4.1 RECESSION IMPACT

TABLE 75 ASIA PACIFIC: PFAS FILTRATION MARKET, BY COUNTRY, 2021–2023 (USD MILLION)

TABLE 76 ASIA PACIFIC: PFAS FILTRATION MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 77 ASIA PACIFIC: PFAS FILTRATION MARKET, BY COUNTRY, 2021–2023 (KILOTON)

TABLE 78 ASIA PACIFIC: PFAS FILTRATION MARKET, BY COUNTRY, 2024–2029 (KILOTON)

TABLE 79 ASIA PACIFIC: PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE, 2021–2023 (USD MILLION)

TABLE 80 ASIA PACIFIC: PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE, 2024–2029 (USD MILLION)

TABLE 81 ASIA PACIFIC: PFAS FILTRATION MARKET, BY CONTAMINANT TYPE, 2021–2023 (USD MILLION)

TABLE 82 ASIA PACIFIC: PFAS FILTRATION MARKET, BY CONTAMINANT TYPE, 2024–2029 (USD MILLION)

TABLE 83 ASIA PACIFIC: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2021–2023 (USD MILLION)

TABLE 84 ASIA PACIFIC: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (USD MILLION)

TABLE 85 ASIA PACIFIC: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2021–2023 (KILOTON)

TABLE 86 ASIA PACIFIC: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (KILOTON)

TABLE 87 ASIA PACIFIC: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 88 ASIA PACIFIC: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

TABLE 89 ASIA PACIFIC: PFAS FILTRATION MARKET, BY END-USE INDUSTRY TYPE, 2021–2023 (KILOTON)

TABLE 90 ASIA PACIFIC: PFAS FILTRATION MARKET, BY END-USE INDUSTRY TYPE, 2024–2029 (KILOTON)

12.4.2 CHINA

12.4.2.1 Stringent water treatment policies to drive demand

TABLE 91 CHINA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 92 CHINA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY,

2024–2029 (USD MILLION)

12.4.3 JAPAN

12.4.3.1 Growing pharmaceutical industry to drive market

TABLE 93 JAPAN: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 94 JAPAN: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.4.4 AUSTRALIA

12.4.4.1 Stringent government regulations to drive market

TABLE 95 AUSTRALIA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 96 AUSTRALIA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.4.5 REST OF ASIA PACIFIC

TABLE 97 REST OF ASIA PACIFIC: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 98 REST OF ASIA PACIFIC: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.5 MIDDLE EAST & AFRICA

12.5.1 RECESSION IMPACT

TABLE 99 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY COUNTRY, 2021–2023 (USD MILLION)

TABLE 100 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 101 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY COUNTRY, 2021–2023 (KILOTON)

TABLE 102 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY COUNTRY, 2024–2029 (KILOTON)

TABLE 103 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2021–2023 (USD MILLION)

TABLE 104 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (USD MILLION)

TABLE 105 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2021–2023 (KILOTON)

TABLE 106 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (KILOTON)

TABLE 107 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE, 2021–2023 (USD MILLION)

TABLE 108 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY

TECHNOLOGY TYPE, 2024–2029 (USD MILLION)

TABLE 109 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY
CONTAMINANT TYPE, 2021–2023 (USD MILLION)

TABLE 110 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY
CONTAMINANT TYPE, 2024–2029 (USD MILLION)

TABLE 111 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY END-USE
INDUSTRY, 2021–2023 (USD MILLION)

TABLE 112 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY END-USE
INDUSTRY, 2024–2029 (USD MILLION)

TABLE 113 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY END-USE
INDUSTRY TYPE, 2021–2023 (KILOTON)

TABLE 114 MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY END-USE
INDUSTRY TYPE, 2024–2029 (KILOTON)

12.5.2 GCC COUNTRIES

TABLE 115 GCC COUNTRIES: PFAS FILTRATION MARKET, BY END-USE
INDUSTRY, 2021–2023 (USD MILLION)

TABLE 116 GCC COUNTRIES: PFAS FILTRATION MARKET, BY END-USE
INDUSTRY, 2024–2029 (USD MILLION)

12.5.2.1 Saudi Arabia

12.5.2.1.1 Government focus on water and wastewater treatment to drive market

12.5.3 UAE

12.5.3.1 Strong oil & gas sector to drive market

12.5.4 REST OF GCC COUNTRIES

12.5.5 SOUTH AFRICA

12.5.5.1 Growth in mining industry to drive market

TABLE 117 SOUTH AFRICA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY,
2021–2023 (USD MILLION)

TABLE 118 SOUTH AFRICA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY,
2024–2029 (USD MILLION)

12.5.6 REST OF MIDDLE EAST & AFRICA

TABLE 119 REST OF MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY
END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 120 REST OF MIDDLE EAST & AFRICA: PFAS FILTRATION MARKET, BY
END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.6 SOUTH AMERICA

12.6.1 RECESSION IMPACT

TABLE 121 SOUTH AMERICA: PFAS FILTRATION MARKET, BY COUNTRY,
2021–2023 (USD MILLION)

TABLE 122 SOUTH AMERICA: PFAS FILTRATION MARKET, BY COUNTRY,

2024–2029 (USD MILLION)

TABLE 123 SOUTH AMERICA: PFAS FILTRATION MARKET, BY COUNTRY, 2021–2023 (KILOTON)

TABLE 124 SOUTH AMERICA: PFAS FILTRATION MARKET, BY COUNTRY, 2024–2029 (KILOTON)

TABLE 125 SOUTH AMERICA: PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE, 2021–2023 (USD MILLION)

TABLE 126 SOUTH AMERICA: PFAS FILTRATION MARKET, BY TECHNOLOGY TYPE, 2024–2029 (USD MILLION)

TABLE 127 SOUTH AMERICA: PFAS FILTRATION MARKET, BY CONTAMINANT TYPE, 2021–2023 (USD MILLION)

TABLE 128 SOUTH AMERICA: PFAS FILTRATION MARKET, BY CONTAMINANT TYPE, 2024–2029 (USD MILLION)

TABLE 129 SOUTH AMERICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2021–2023 (USD MILLION)

TABLE 130 SOUTH AMERICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (USD MILLION)

TABLE 131 SOUTH AMERICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2021–2023 (KILOTON)

TABLE 132 SOUTH AMERICA: PFAS FILTRATION MARKET, BY REMEDIATION TECHNOLOGY, 2024–2029 (KILOTON)

TABLE 133 SOUTH AMERICA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY TYPE, 2021–2023 (KILOTON)

TABLE 134 SOUTH AMERICA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY TYPE, 2024–2029 (KILOTON)

TABLE 135 SOUTH AMERICA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 136 SOUTH AMERICA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.6.2 BRAZIL

12.6.2.1 Government support and regulations to drive market

TABLE 137 BRAZIL: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 138 BRAZIL: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.6.3 ARGENTINA

12.6.3.1 Stringent environmental regulations to drive market

TABLE 139 ARGENTINA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 140 ARGENTINA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12.6.4 REST OF SOUTH AMERICA

TABLE 141 REST OF SOUTH AMERICA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2021–2023 (USD MILLION)

TABLE 142 REST OF SOUTH AMERICA: PFAS FILTRATION MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

13 COMPETITIVE LANDSCAPE

13.1 KEY PLAYER STRATEGIES/RIGHT TO WIN

TABLE 143 COMPANIES ADOPTED PRODUCT LAUNCHES AND ACQUISITIONS AS KEY GROWTH STRATEGIES BETWEEN 2019 AND 2023

13.2 REVENUE ANALYSIS

FIGURE 42 REVENUE ANALYSIS

13.3 MARKET SHARE ANALYSIS

FIGURE 43 MARKET SHARE OF KEY PLAYERS, 2023

TABLE 144 PFAS FILTRATION MARKET: DEGREE OF COMPETITION

13.4 COMPANY EVALUATION MATRIX, 2023

13.4.1 STARS

13.4.2 EMERGING LEADERS

13.4.3 PERVASIVE PLAYERS

13.4.4 PARTICIPANTS

FIGURE 44 PFAS FILTRATION MARKET: COMPANY EVALUATION MATRIX, 2023

13.4.5 COMPANY FOOTPRINT

TABLE 145 COMPANY END-USE INDUSTRY FOOTPRINT

TABLE 146 COMPANY REGION FOOTPRINT

TABLE 147 COMPANY OVERALL FOOTPRINT

13.5 START-UPS/SMES EVALUATION MATRIX, 2023

13.5.1 PROGRESSIVE COMPANIES

13.5.2 RESPONSIVE COMPANIES

13.5.3 DYNAMIC COMPANIES

13.5.4 STARTING BLOCKS

FIGURE 45 PFAS FILTRATION MARKET: START-UPS/SMES MATRIX, 2023

13.5.5 COMPETITIVE BENCHMARKING

TABLE 148 PFAS FILTRATION MARKET: COMPETITIVE BENCHMARKING OF KEY START-UPS/SMES

TABLE 149 DETAILED LIST OF COMPANIES

13.6 COMPANY VALUATION AND FINANCIAL MATRIX

FIGURE 46 COMPANY VALUATION

FIGURE 47 FINANCIAL METRICS

13.7 BRAND/PRODUCT COMPARISON

FIGURE 48 BRAND/PRODUCT COMPARISON

13.8 COMPETITIVE SCENARIO AND TRENDS

13.8.1 PRODUCT LAUNCHES

TABLE 150 PFAS FILTRATION MARKET: PRODUCT LAUNCHES, JANUARY
2019–DECEMBER 2023

13.8.2 DEALS

TABLE 151 PFAS FILTRATION MARKET: DEALS, JANUARY 2019—DECEMBER 2023

14 COMPANY PROFILES

(Business Overview, Products Offered, Recent Developments, MnM View Right to win, Strategic choices made, Weaknesses and competitive threats) *

14.1 MAJOR PLAYERS

14.1.1 VEOLIA

TABLE 152 VEOLIA: COMPANY OVERVIEW

FIGURE 49 VEOLIA: COMPANY SNAPSHOT

TABLE 153 VEOLIA: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 154 VEOLIA: DEALS

14.1.2 AECOM

TABLE 155 AECOM: COMPANY OVERVIEW

FIGURE 50 AECOM: COMPANY SNAPSHOT

TABLE 156 AECOM: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 157 AECOM: PRODUCT LAUNCHES

TABLE 158 AECOM: DEALS

14.1.3 WSP

TABLE 159 WSP CORPORATION: COMPANY OVERVIEW

FIGURE 51 WSP: COMPANY SNAPSHOT

TABLE 160 WSP: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 161 WSP: DEALS

14.1.4 XYLEM

TABLE 162 XYLEM: COMPANY OVERVIEW

FIGURE 52 XYLEM: COMPANY SNAPSHOT

TABLE 163 XYLEM: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 164 XYLEM: DEALS

14.1.5 JACOBS

TABLE 165 JACOBS: COMPANY OVERVIEW

FIGURE 53 JACOBS: COMPANY SNAPSHOT

TABLE 166 JACOBS: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 167 JACOBS: DEALS

14.1.6 CLEAN EARTH

TABLE 168 CLEAN EARTH: COMPANY OVERVIEW

TABLE 169 CLEAN EARTH: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 170 CLEAN EARTH: PRODUCT LAUNCHES

TABLE 171 CLEAN EARTH: DEALS

14.1.7 JOHN WOOD GROUP PLC

TABLE 172 JOHN WOOD GROUP PLC: COMPANY OVERVIEW

FIGURE 54 JOHN WOOD GROUP PLC: COMPANY SNAPSHOT

TABLE 173 JOHN WOOD GROUP PLC: PRODUCTS/SOLUTIONS/SERVICES OFFERED

14.1.8 TRC COMPANIES, INC.

TABLE 174 TRC COMPANIES, INC.: COMPANY OVERVIEW

TABLE 175 TRC COMPANIES, INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

14.1.9 BATTELLE MEMORIAL INSTITUTE

TABLE 176 BATTELLE MEMORIAL INSTITUTE: COMPANY OVERVIEW

TABLE 177 BATTELLE MEMORIAL INSTITUTE:
PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 178 BATTELLE MEMORIAL INSTITUTE: PRODUCT LAUNCHES

TABLE 179 BATTELLE MEMORIAL INSTITUTE: DEALS

14.1.10 CYCLOPURE

TABLE 180 CYCLOPURE: COMPANY OVERVIEW

TABLE 181 CYCLOPURE: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 182 CYCLOPURE: DEALS

14.2 OTHER PLAYERS

14.2.1 CALGON CARBON CORPORATION

TABLE 183 CALGON CARBON CORPORATION: COMPANY OVERVIEW

14.2.2 REGENESIS

TABLE 184 REGENESIS: COMPANY OVERVIEW

14.2.3 MINERAL TECHNOLOGIES, INC.

TABLE 185 MINERAL TECHNOLOGIES, INC.: COMPANY OVERVIEW

14.2.4 CDM SMITH, INC.

TABLE 186 CDM SMITH, INC. COMPANY OVERVIEW

14.2.5 PENTAIR

TABLE 187 PENTAIR: COMPANY OVERVIEW

14.2.6 AQUASANA INC.

TABLE 188 AQUASANA INC.: COMPANY OVERVIEW

14.2.7 NEWTERRA CORPORATION

TABLE 189 NEWTERRA CORPORATION: COMPANY OVERVIEW

14.2.8 LANXESS

TABLE 190 LANXESS.: COMPANY OVERVIEW

14.2.9 EUROWATER

TABLE 191 EUROWATER: COMPANY OVERVIEW

14.2.10 AQUA-AEROBIC SYSTEMS, INC.

TABLE 192 AQUA-AEROBIC SYSTEMS, INC.: COMPANY OVERVIEW

14.2.11 HYDROVIV

TABLE 193 HYDROVIV: COMPANY OVERVIEW

14.2.12 SALTWORKS TECHNOLOGIES, INC.

TABLE 194 SALTWORKS TECHNOLOGIES, INC.: COMPANY OVERVIEW

14.2.13 ACLARITY, INC.

TABLE 195 ACLARITY, INC.: COMPANY OVERVIEW

14.2.14 AQUAGGA, INC.

TABLE 196 AQUAGGA, INC.: COMPANY OVERVIEW

14.2.15 ONVECTOR LLC.

TABLE 197 ONVECTOR LLC.: COMPANY OVERVIEW

*Details on Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.

15 APPENDIX

15.1 KNOWLEDGESTORE: MARKETSDANDMARKETS' SUBSCRIPTION PORTAL

15.2 CUSTOMIZATION OPTIONS

15.3 RELATED REPORTS

15.4 AUTHOR DETAILS

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