

Onsite Wastewater Treatment Systems (OWTS) Market Outlook 2026-2034: Market Share, and Growth Analysis By System Technology (Conventional Systems, Advanced Treatment Systems, Membrane Bioreactors (MBR), Sequencing Batch Reactors (SBR), Constructed Wetlands, Electrochemical Treatment, Others), By Treatment Capacity (20,000 L/day), By Smart Features, By Maintenance Model, By System Components

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Abstracts

The Onsite Wastewater Treatment Systems (OWTS) Market is valued at USD 22.46 billion in 2025 and is projected to grow at a CAGR of 9.9% to reach USD 52.53 billion by 2034.

Onsite Wastewater Treatment Systems (OWTS) Market

The Onsite Wastewater Treatment Systems (OWTS) Market addresses decentralized wastewater management for single homes, clustered housing, commercial facilities, resorts, industrial outfalls, institutions, and remote or peri-urban communities where sewer connectivity is limited or cost-prohibitive. Solutions range from conventional septic tanks with drainfields to advanced treatment units (ATUs), membrane bioreactors (MBR/MBBR), media filters, constructed wetlands, and modular package plants with disinfection and remote monitoring. Key trends include smart sensing and telemetry for compliance, low-energy biological processes, nutrient-targeted retrofits, water reuse for landscaping and non-potable needs, and prefabricated systems that compress installation timelines. Market drivers span expanding exurban development, stricter

nutrient caps in sensitive watersheds, industrial pretreatment mandates, disaster resilience planning, and lifecycle-cost parity versus network expansion. The competitive landscape blends global water OEMs, regional fabricators, onsite installers, engineering consultants, and service operators offering maintenance contracts and performance warranties. Standards harmonization, code modernization, and funding mechanisms shape adoption, while barriers include variable permitting, site constraints, homeowner O&M behavior, and the need for certified professionals. Overall, OWTS is moving from “install and forget” to data-driven, service-centric assets that safeguard groundwater, enable decentralized growth, and complement centralized infrastructure with scalable, compliant treatment at the parcel or cluster level.

Onsite Wastewater Treatment Systems (OWTS) Market Key Insights

Shift to advanced treatment for nutrients Regulators and watershed managers increasingly require nitrogen and phosphorus reduction, pushing upgrades from conventional septic to ATUs, media filters, and membrane-based polishing. Designs emphasize stable effluent under load swings and cold climates, improving receiving-water outcomes and permitting certainty.

Digital monitoring becomes standard practice IoT sensors, telemetry, and cloud dashboards enable remote alarms, dosing optimization, and compliance reporting. Service providers bundle monitoring into multi-year O&M plans, reducing inspection costs, catching failures early, and creating predictable asset performance for regulators and owners.

Modularity accelerates deployment Factory-built, skid or containerized OWTS shorten installation windows, control quality, and simplify approvals. Phased expansion supports growing subdivisions, resorts, and industrial campuses, while standardized footprints reduce engineering hours and contractor variability across sites.

Resilience and climate adaptation Designs address floodplains, high groundwater, and drought with elevated or pressurized dispersal, drip irrigation, and reuse loops. Materials and controls are chosen for intermittent power, storm surges, and temperature extremes, sustaining treatment during disruptions and protecting shallow aquifers.

Lifecycle economics and service models Water-as-a-Service and fixed-fee maintenance shift capex/opex tradeoffs, while performance guarantees align

stakeholders. Owners prioritize low energy use, fewer pump-outs, and chemical efficiency, with total cost framed over multi-year regulatory cycles rather than upfront price alone.

Industrial and commercial growth nodes Food & beverage, logistics hubs, mining support facilities, and institutional campuses adopt OWTS to meet discharge limits and avoid sewer extensions. Pretreatment for fats, oils, and grease or high BOD loads is integrated, ensuring compliance and operational uptime.

Soil and site-specific engineering Hydrogeology, soil percolation, and lot size dictate dispersion choices - trenches, mounds, drip fields, or wetlands. Advanced modeling, GIS layers, and pilot tests inform design, maximizing infiltration while preventing breakout, surfacing, and neighbor impacts.

Materials and component innovation Corrosion-resistant tanks, energy-efficient blowers, variable-speed pumps, and smart dosing valves extend equipment life. Media innovations (textile, foam, expanded shale, engineered biofilm carriers) improve nitrification/denitrification and reduce footprint in constrained parcels.

Regulatory modernization and training Updated onsite codes, installer certification, and risk-tiered oversight streamline approvals while ensuring protection of drinking-water wells and surface waters. Standardized sampling and e-reporting increase transparency and support funding eligibility.

Integration with water reuse and green infrastructure Non-potable reuse for irrigation or toilet flushing, plus alignment with rainwater harvesting and permeable landscapes, enhances water balance on site. Coupling OWTS with nature-based dispersal improves community acceptance and long-term sustainability.

Onsite Wastewater Treatment Systems (OWTS) Market Regional Analysis

North America

Adoption is propelled by exurban housing growth, lake and coastal nutrient limits, and the need to replace aging septic systems. Counties and states promote advanced treatment and maintenance contracts, while insurers and lenders increasingly scrutinize

onsite performance. Digital monitoring, drip dispersal, and nitrogen-reducing units are common in sensitive watersheds and wellhead protection zones.

Europe

Stringent groundwater protection and small-town infrastructure gaps support advanced compact systems with nutrient removal and low noise profiles. Architectural constraints and heritage settings favor discreet footprints and aesthetic integration. Performance certification schemes and installer accreditation drive quality, while reuse pilots for irrigation and grey-green integration expand in Mediterranean and island locales.

Asia-Pacific

Rapid peri-urban development, tourism growth, and industrial clusters create demand for modular package plants where sewerage lags. Tropical climates and monsoon variability require robust pretreatment and flood-aware dispersal. Partnerships with local EPCs and micro-utility operators broaden service coverage, and remote monitoring helps address skills shortages across dispersed geographies.

Middle East & Africa

Water scarcity and dispersed settlements prioritize low-energy biological systems with reuse for landscaping and agriculture. Harsh climates drive material choices and ventilation strategies, and elevated or lined dispersal protects shallow aquifers. Resorts, worker camps, and industrial enclaves deploy containerized units, with O&M contracts ensuring compliance under challenging conditions.

South & Central America

Tourism corridors, mining municipalities, and agricultural zones adopt OWTS to safeguard rivers and groundwater where centralized networks are costly. Regulatory programs emphasize septic upgrades and cluster systems with nutrient polishing. Local fabrication capabilities, standardized designs, and training initiatives strengthen installer ecosystems and reduce lifecycle costs for communities.

Onsite Wastewater Treatment Systems (OWTS) Market Segmentation

By System Technology

Conventional Systems

Advanced Treatment Systems

Membrane Bioreactors (MBR)

Sequencing Batch Reactors (SBR)

Constructed Wetlands

Electrochemical Treatment

Others

By Treatment Capacity

20

000 L/day

By Smart Features

Remote Monitoring

Automated Dosing

Predictive Maintenance

Overflow Prevention

By Maintenance Model

Homeowner-Managed

Service Contract

Utility-Owned

Community Systems

By System Components

Pretreatment Units

Secondary Treatment

Disinfection

Effluent Polishing

Key Market players

Infiltrator Water Technologies (ADS), Orenco Systems, BioMicrobics, Fuji Clean, Premier Tech Water & Environment (Ecoflo/Rewatec), Kingspan (Klargester), Tricel, ATB WATER GmbH, BIOROCK, BioKube, GRAF (KLARO), WPL (WCS Environmental Engineering), Clearford Water Systems, Ozzi Kleen, Presby Environmental.

Onsite Wastewater Treatment Systems (OWTS) Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modelling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends. Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behaviour are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

Onsite Wastewater Treatment Systems (OWTS) Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial

performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption. Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — Onsite Wastewater Treatment Systems (OWTS) market data and outlook to 2034

United States

Canada

Mexico

Europe — Onsite Wastewater Treatment Systems (OWTS) market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Onsite Wastewater Treatment Systems (OWTS) market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Onsite Wastewater Treatment Systems (OWTS)
market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Onsite Wastewater Treatment Systems (OWTS)
market data and outlook to 2034

Brazil

Argentina

Chile

Peru

* We can include data and analysis of additional countries on demand.

Research Methodology

This study combines primary inputs from industry experts across the Onsite Wastewater Treatment Systems (OWTS) value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the Onsite Wastewater Treatment Systems (OWTS) industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the Onsite Wastewater Treatment Systems (OWTS) Market Report

Global Onsite Wastewater Treatment Systems (OWTS) market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Onsite Wastewater Treatment Systems (OWTS) trade, costs, and supply chains

Onsite Wastewater Treatment Systems (OWTS) market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Onsite Wastewater Treatment Systems (OWTS) market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Onsite Wastewater Treatment Systems (OWTS) market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and Onsite Wastewater Treatment Systems (OWTS) supply chain analysis

Onsite Wastewater Treatment Systems (OWTS) trade analysis, Onsite Wastewater Treatment Systems (OWTS) market price analysis, and Onsite Wastewater Treatment Systems (OWTS) supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Onsite Wastewater Treatment Systems (OWTS) market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

* The updated report will be delivered within 3 working days

Contents

1. TABLE OF CONTENTS

- 1.1 List of Tables
- 1.2 List of Figures

2. GLOBAL ONSITE WASTEWATER TREATMENT SYSTEMS (OWTS) MARKET SUMMARY, 2025

- 2.1 Onsite Wastewater Treatment Systems (OWTS) Industry Overview
 - 2.1.1 Global Onsite Wastewater Treatment Systems (OWTS) Market Revenues (In US\$ billion)
- 2.2 Onsite Wastewater Treatment Systems (OWTS) Market Scope
- 2.3 Research Methodology

3. ONSITE WASTEWATER TREATMENT SYSTEMS (OWTS) MARKET INSIGHTS, 2024-2034

- 3.1 Onsite Wastewater Treatment Systems (OWTS) Market Drivers
- 3.2 Onsite Wastewater Treatment Systems (OWTS) Market Restraints
- 3.3 Onsite Wastewater Treatment Systems (OWTS) Market Opportunities
- 3.4 Onsite Wastewater Treatment Systems (OWTS) Market Challenges
- 3.5 Tariff Impact on Global Onsite Wastewater Treatment Systems (OWTS) Supply Chain Patterns

4. ONSITE WASTEWATER TREATMENT SYSTEMS (OWTS) MARKET ANALYTICS

- 4.1 Onsite Wastewater Treatment Systems (OWTS) Market Size and Share, Key Products, 2025 Vs 2034
- 4.2 Onsite Wastewater Treatment Systems (OWTS) Market Size and Share, Dominant Applications, 2025 Vs 2034
- 4.3 Onsite Wastewater Treatment Systems (OWTS) Market Size and Share, Leading End Uses, 2025 Vs 2034
- 4.4 Onsite Wastewater Treatment Systems (OWTS) Market Size and Share, High Growth Countries, 2025 Vs 2034
- 4.5 Five Forces Analysis for Global Onsite Wastewater Treatment Systems (OWTS) Market
 - 4.5.1 Onsite Wastewater Treatment Systems (OWTS) Industry Attractiveness Index,

2025

- 4.5.2 Onsite Wastewater Treatment Systems (OWTS) Supplier Intelligence
- 4.5.3 Onsite Wastewater Treatment Systems (OWTS) Buyer Intelligence
- 4.5.4 Onsite Wastewater Treatment Systems (OWTS) Competition Intelligence
- 4.5.5 Onsite Wastewater Treatment Systems (OWTS) Product Alternatives and Substitutes Intelligence
- 4.5.6 Onsite Wastewater Treatment Systems (OWTS) Market Entry Intelligence

5. GLOBAL ONSITE WASTEWATER TREATMENT SYSTEMS (OWTS) MARKET STATISTICS – INDUSTRY REVENUE, MARKET SHARE, GROWTH TRENDS AND FORECAST BY SEGMENTS, TO 2034

- 5.1 World Onsite Wastewater Treatment Systems (OWTS) Market Size, Potential and Growth Outlook, 2024- 2034 (\$ billion)
- 5.1 Global Onsite Wastewater Treatment Systems (OWTS) Sales Outlook and CAGR Growth By System Technology, 2024- 2034 (\$ billion)
- 5.2 Global Onsite Wastewater Treatment Systems (OWTS) Sales Outlook and CAGR Growth By Treatment Capacity, 2024- 2034 (\$ billion)
- 5.3 Global Onsite Wastewater Treatment Systems (OWTS) Sales Outlook and CAGR Growth By Smart Features, 2024- 2034 (\$ billion)
- 5.4 Global Onsite Wastewater Treatment Systems (OWTS) Sales Outlook and CAGR Growth By Maintenance Model, 2024- 2034 (\$ billion)
- 5.5 Global Onsite Wastewater Treatment Systems (OWTS) Sales Outlook and CAGR Growth By System Components, 2024- 2034 (\$ billion)
- 5.6 Global Onsite Wastewater Treatment Systems (OWTS) Market Sales Outlook and Growth by Region, 2024- 2034 (\$ billion)

6. ASIA PACIFIC ONSITE WASTEWATER TREATMENT SYSTEMS (OWTS) INDUSTRY STATISTICS – MARKET SIZE, SHARE, COMPETITION AND OUTLOOK

- 6.1 Asia Pacific Onsite Wastewater Treatment Systems (OWTS) Market Insights, 2025
- 6.2 Asia Pacific Onsite Wastewater Treatment Systems (OWTS) Market Revenue Forecast By System Technology, 2024- 2034 (USD billion)
- 6.3 Asia Pacific Onsite Wastewater Treatment Systems (OWTS) Market Revenue Forecast By Treatment Capacity, 2024- 2034 (USD billion)
- 6.4 Asia Pacific Onsite Wastewater Treatment Systems (OWTS) Market Revenue Forecast By Smart Features, 2024- 2034 (USD billion)
- 6.5 Asia Pacific Onsite Wastewater Treatment Systems (OWTS) Market Revenue Forecast By Maintenance Model, 2024- 2034 (USD billion)

6.6 Asia Pacific Onsite Wastewater Treatment Systems (OWTS) Market Revenue Forecast By System Components, 2024- 2034 (USD billion)

6.7 Asia Pacific Onsite Wastewater Treatment Systems (OWTS) Market Revenue Forecast by Country, 2024- 2034 (USD billion)

6.7.1 China Onsite Wastewater Treatment Systems (OWTS) Market Size, Opportunities, Growth 2024- 2034

6.7.2 India Onsite Wastewater Treatment Systems (OWTS) Market Size, Opportunities, Growth 2024- 2034

6.7.3 Japan Onsite Wastewater Treatment Systems (OWTS) Market Size, Opportunities, Growth 2024- 2034

6.7.4 Australia Onsite Wastewater Treatment Systems (OWTS) Market Size, Opportunities, Growth 2024- 2034

7. EUROPE ONSITE WASTEWATER TREATMENT SYSTEMS (OWTS) MARKET DATA, PENETRATION, AND BUSINESS PROSPECTS TO 2034

7.1 Europe Onsite Wastewater Treatment Systems (OWTS) Market Key Findings, 2025

7.2 Europe Onsite Wastewater Treatment Systems (OWTS) Market Size and Percentage Breakdown By System Technology, 2024- 2034 (USD billion)

7.3 Europe Onsite Wastewater Treatment Systems (OWTS) Market Size and Percentage Breakdown By Treatment Capacity, 2024- 2034 (USD billion)

7.4 Europe Onsite Wastewater Treatment Systems (OWTS) Market Size and Percentage Breakdown By Smart Features, 2024- 2034 (USD billion)

7.5 Europe Onsite Wastewater Treatment Systems (OWTS) Market Size and Percentage Breakdown By Maintenance Model, 2024- 2034 (USD billion)

7.6 Europe Onsite Wastewater Treatment Systems (OWTS) Market Size and Percentage Breakdown By System Components, 2024- 2034 (USD billion)

7.7 Europe Onsite Wastewater Treatment Systems (OWTS) Market Size and Percentage Breakdown by Country, 2024- 2034 (USD billion)

7.7.1 Germany Onsite Wastewater Treatment Systems (OWTS) Market Size, Trends, Growth Outlook to 2034

7.7.2 United Kingdom Onsite Wastewater Treatment Systems (OWTS) Market Size, Trends, Growth Outlook to 2034

7.7.2 France Onsite Wastewater Treatment Systems (OWTS) Market Size, Trends, Growth Outlook to 2034

7.7.2 Italy Onsite Wastewater Treatment Systems (OWTS) Market Size, Trends, Growth Outlook to 2034

7.7.2 Spain Onsite Wastewater Treatment Systems (OWTS) Market Size, Trends, Growth Outlook to 2034

8. NORTH AMERICA ONSITE WASTEWATER TREATMENT SYSTEMS (OWTS) MARKET SIZE, GROWTH TRENDS, AND FUTURE PROSPECTS TO 2034

8.1 North America Snapshot, 2025

8.2 North America Onsite Wastewater Treatment Systems (OWTS) Market Analysis and Outlook By System Technology, 2024- 2034 (\$ billion)

8.3 North America Onsite Wastewater Treatment Systems (OWTS) Market Analysis and Outlook By Treatment Capacity, 2024- 2034 (\$ billion)

8.4 North America Onsite Wastewater Treatment Systems (OWTS) Market Analysis and Outlook By Smart Features, 2024- 2034 (\$ billion)

8.5 North America Onsite Wastewater Treatment Systems (OWTS) Market Analysis and Outlook By Maintenance Model, 2024- 2034 (\$ billion)

8.6 North America Onsite Wastewater Treatment Systems (OWTS) Market Analysis and Outlook By System Components, 2024- 2034 (\$ billion)

8.7 North America Onsite Wastewater Treatment Systems (OWTS) Market Analysis and Outlook by Country, 2024- 2034 (\$ billion)

8.7.1 United States Onsite Wastewater Treatment Systems (OWTS) Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.7.1 Canada Onsite Wastewater Treatment Systems (OWTS) Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.7.1 Mexico Onsite Wastewater Treatment Systems (OWTS) Market Size, Share, Growth Trends and Forecast, 2024- 2034

9. SOUTH AND CENTRAL AMERICA ONSITE WASTEWATER TREATMENT SYSTEMS (OWTS) MARKET DRIVERS, CHALLENGES, AND FUTURE PROSPECTS

9.1 Latin America Onsite Wastewater Treatment Systems (OWTS) Market Data, 2025

9.2 Latin America Onsite Wastewater Treatment Systems (OWTS) Market Future By System Technology, 2024- 2034 (\$ billion)

9.3 Latin America Onsite Wastewater Treatment Systems (OWTS) Market Future By Treatment Capacity, 2024- 2034 (\$ billion)

9.4 Latin America Onsite Wastewater Treatment Systems (OWTS) Market Future By Smart Features, 2024- 2034 (\$ billion)

9.5 Latin America Onsite Wastewater Treatment Systems (OWTS) Market Future By Maintenance Model, 2024- 2034 (\$ billion)

9.6 Latin America Onsite Wastewater Treatment Systems (OWTS) Market Future By System Components, 2024- 2034 (\$ billion)

9.7 Latin America Onsite Wastewater Treatment Systems (OWTS) Market Future by

Country, 2024- 2034 (\$ billion)

9.7.1 Brazil Onsite Wastewater Treatment Systems (OWTS) Market Size, Share and Opportunities to 2034

9.7.2 Argentina Onsite Wastewater Treatment Systems (OWTS) Market Size, Share and Opportunities to 2034

10. MIDDLE EAST AFRICA ONSITE WASTEWATER TREATMENT SYSTEMS (OWTS) MARKET OUTLOOK AND GROWTH PROSPECTS

10.1 Middle East Africa Overview, 2025

10.2 Middle East Africa Onsite Wastewater Treatment Systems (OWTS) Market Statistics By System Technology, 2024- 2034 (USD billion)

10.3 Middle East Africa Onsite Wastewater Treatment Systems (OWTS) Market Statistics By Treatment Capacity, 2024- 2034 (USD billion)

10.4 Middle East Africa Onsite Wastewater Treatment Systems (OWTS) Market Statistics By Smart Features, 2024- 2034 (USD billion)

10.5 Middle East Africa Onsite Wastewater Treatment Systems (OWTS) Market Statistics By Maintenance Model, 2024- 2034 (USD billion)

10.6 Middle East Africa Onsite Wastewater Treatment Systems (OWTS) Market Statistics By System Components, 2024- 2034 (USD billion)

10.7 Middle East Africa Onsite Wastewater Treatment Systems (OWTS) Market Statistics by Country, 2024- 2034 (USD billion)

10.7.1 Middle East Onsite Wastewater Treatment Systems (OWTS) Market Value, Trends, Growth Forecasts to 2034

10.7.2 Africa Onsite Wastewater Treatment Systems (OWTS) Market Value, Trends, Growth Forecasts to 2034

11. ONSITE WASTEWATER TREATMENT SYSTEMS (OWTS) MARKET STRUCTURE AND COMPETITIVE LANDSCAPE

11.1 Key Companies in Onsite Wastewater Treatment Systems (OWTS) Industry

11.2 Onsite Wastewater Treatment Systems (OWTS) Business Overview

11.3 Onsite Wastewater Treatment Systems (OWTS) Product Portfolio Analysis

11.4 Financial Analysis

11.5 SWOT Analysis

12 APPENDIX

12.1 Global Onsite Wastewater Treatment Systems (OWTS) Market Volume (Tons)

12.1 Global Onsite Wastewater Treatment Systems (OWTS) Trade and Price Analysis

12.2 Onsite Wastewater Treatment Systems (OWTS) Parent Market and Other
Relevant Analysis

12.3 Publisher Expertise

12.2 Onsite Wastewater Treatment Systems (OWTS) Industry Report Sources and
MethodologyOGAMV25R0926

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