

# **Agri Water Recycling Systems Market Forecasts to 2034 – Global Analysis By Component (Filtration Systems, Biological Treatment, Disinfection Systems and Desalination Units), Water Source, System Type, Capacity, Fragment, Application, End User and By Geography**

<https://marketpublishers.com/r/AA70B5B8A4F8EN.html>

Date: May 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: AA70B5B8A4F8EN

## **Abstracts**

According to Statistics MRC, the Global Agri Water Recycling Systems Market is accounted for \$6.4 billion in 2026 and is expected to reach \$14.6 billion by 2034 growing at a CAGR of 10.8% during the forecast period. Agri water recycling systems refer to filtration, biological treatment, disinfection, and desalination technology installations that treat and reclaim farm runoff, food processing plant effluent, dairy and livestock wastewater, aquaculture tank water, and agricultural greywater for reuse in irrigation, livestock drinking, food washing, and other on-farm water demand applications, reducing freshwater intake requirements, minimizing agricultural water pollution discharge, and improving farm water use efficiency through closed-loop water management approaches across diverse agricultural operational contexts.

### **Market Dynamics:**

#### **Driver:**

Regulatory Water Discharge Compliance Requirements

Expanding agricultural water discharge regulation across the European Union Water Framework Directive, US EPA agricultural water quality regulations, and national water protection legislation creating mandatory effluent treatment compliance obligations for

food processing facilities, intensive livestock operations, and aquaculture producers is compelling investment in on-site water treatment systems that enable regulatory compliance while capturing treated water value for on-farm reuse rather than costly discharge disposal management.

**Restraint:****High System Capital and Maintenance Cost**

Agricultural water recycling system installation capital cost and ongoing operational maintenance requirements including filter media replacement, chemical dosing, and mechanical equipment service, creating a total cost of ownership substantially exceeding conventional freshwater sourcing costs in regions with adequate freshwater availability, limiting economic adoption motivation primarily to water-scarce regions, regulatory compliance contexts, or operations where water quality improvement value justifies system investment.

**Opportunity:****Water Footprint Corporate Supply Chain Requirements**

Major food and beverage companies' supply chain water stewardship programs require supplier water use documentation and water recycling practice adoption as supply chain qualification requirements, creating institutional adoption incentives for agricultural water recycling system investment beyond regulatory compliance motivation, generating premium market access benefits for farms demonstrating certified water recycling practice adoption.

**Threat:****Freshwater Resource Regulatory Allocation**

In regions with regulated freshwater allocation, government-subsidized freshwater pricing for agriculture that does not reflect true scarcity cost reduces economic incentive for water recycling investment when subsidized freshwater alternatives remain substantially cheaper than treated recycled water production cost, creating a policy-dependent market constraint that limits water recycling adoption in irrigation-dominated agricultural systems.

**Covid-19 Impact:**

COVID-19 supply chain disruptions affecting water treatment chemical availability created operational challenges for agricultural water recycling programs while simultaneously elevating water security awareness, motivating resilience investment. Post-pandemic regulatory tightening and water scarcity amplification from climate disruption continue driving agri water recycling system market growth.

The desalination units segment is expected to be the largest during the forecast period

The desalination units segment is expected to account for the largest market share during the forecast period, due to the premium capital value of agricultural desalination installations for coastal and arid region freshwater production that generates the highest per-unit equipment revenue within the agri water technology portfolio, combined with strong government infrastructure investment in desalination capacity expansion across water-scarce agricultural production regions in the Middle East, Mediterranean, and arid coastal zones globally.

The farm runoff segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the farm runoff segment is predicted to witness the highest growth rate, driven by expanding agricultural runoff treatment regulatory requirements across major crop-producing regions where surface water quality protection legislation is compelling irrigation return water treatment and recycling programs, combined with improving treatment technology economics enabling farm runoff recycling at commercially viable cost structures for mid-size farming operations previously unable to justify treatment investment.

**Region with largest share:**

During the forecast period, the North America region is expected to hold the largest market share, due to the United States hosting leading water treatment technology vendors, including Veolia, Xylem, Pentair, and Evoqua generating substantial North American agricultural water technology revenue, strong regulatory water quality compliance investment across intensive livestock and food processing sectors, and a well-developed water technology services ecosystem.

**Region with highest CAGR:**

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to India, China, and Southeast Asian countries experiencing severe agricultural water scarcity, creating urgent water recycling adoption motivation, government investment in agricultural water efficiency programs, and a rapidly expanding food processing sector, creating industrial agricultural effluent treatment demand.

### **Key players in the market**

Some of the key players in Agri Water Recycling Systems Market include Veolia Environnement S.A., SUEZ SA, Xylem Inc., Pentair plc, Evoqua Water Technologies LLC, DuPont de Nemours Inc., Kurita Water Industries Ltd., Organo Corporation, Netafim Ltd., Lindsay Corporation, Valmont Industries Inc., Jain Irrigation Systems Ltd., Grundfos Holding A/S, ITT Inc., and Toro Company.

### **Key Developments:**

In April 2026, Xylem Inc. launched a modular containerized agri water recycling system enabling rapid deployment at farm processing facilities treating up to 500 cubic meters daily with integrated monitoring for regulatory compliance documentation and water quality verification.

In March 2026, Veolia Environnement S.A. secured a major intensive livestock operation water treatment contract in China deploying biological nutrient removal and disinfection systems enabling wastewater reuse for irrigation compliance with new agricultural effluent discharge standards.

In December 2025, Evoqua Water Technologies LLC introduced a new dairy farm water recycling system achieving 80 percent water reuse from milking parlor washdown and manure management operations reducing freshwater consumption by over 1 million liters annually per 500-cow dairy operation.

### **Components Covered:**

Filtration Systems

Biological Treatment

Disinfection Systems

Desalination Units

Water Sources Covered:

Farm Runoff

Processing Plant Effluent

Dairy & Livestock Wastewater

Aquaculture Water

Greywater Reuse

System Types Covered:

Decentralized On-Farm

Centralized Community

Mobile Treatment Units

Capacities Covered:

500 m<sup>3</sup>/day

Fragments Covered:

Pumps & Valves

Sensors & Controllers

Storage Tanks

## Monitoring Software

### Applications Covered:

Irrigation Water Recycling

Livestock Drinking Water

Aquaculture Recirculation

Food Processing Wash Water

Nutrient Recovery

### End Users Covered:

Commercial Crop Farms

Livestock & Dairy Farms

Food & Beverage Processors

Aquaculture Farms

Government Irrigation Projects

### Regions Covered:

North America

United States

Canada

Mexico

## Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

## Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

**Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

**Company Profiling**

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

**Regional Segmentation**

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

## Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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