

Industrial Water Circularity Solutions Market Forecasts to 2034 – Global Analysis By Deployment Model (On-Premise / Owner-Operated, Build-Own- Operate-Transfer (BOOT), Design-Build-Operate (DBO), Public-Private Partnerships (PPPs) and Water- as-a-Service (WaaS) Subscription), Recovered Resource, Technology, Application, Industry Vertical, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Industrial Water Circularity Solutions Market is accounted for \$2.1 billion in 2026 and is expected to reach \$5.8 billion by 2034 growing at a CAGR of 13.5% during the forecast period. Industrial water circularity solutions are integrated technological systems and processes designed to maximize water reuse, minimize wastewater discharge, and recover valuable resources within industrial operations. They function by combining advanced filtration, biological treatment, and thermal separation technologies to purify contaminated water streams for repeated use. These solutions encompass membrane bioreactors, zero liquid discharge systems, and resource recovery platforms that facilitate targeted extraction of high-purity water, metals, and energy. Their application ensures sustainable water management, supporting regulatory compliance and reducing reliance on freshwater sources in water-stressed regions.

Market Dynamics:

Driver:

Stringent Water Discharge Regulations

The escalating global emphasis on water conservation compels industrial facilities to adopt water circularity solutions offering sustainable wastewater management alternatives. Growing regulatory pressure to minimize effluent discharge and protect aquatic ecosystems is accelerating the integration of these treatment systems into mainstream production lines. This transition is supported by advancements in filtration technologies, which enhance water purity and resource recovery consistency. Consequently, industries are investing in specialized circularity infrastructure to achieve compliance with stringent environmental mandates while optimizing water procurement costs.

Restraint:

High Implementation Costs

The substantial expenses associated with installing and operating advanced industrial water circularity solutions represent a significant barrier to widespread commercial adoption. Creating highly stable and efficient treatment systems often requires complex engineering processes and sophisticated monitoring techniques, which escalate overall production costs. Furthermore, the sensitivity of certain membrane technologies to specific water matrix impurities limits their operational lifespan in heterogeneous waste streams. These factors collectively constrain market expansion, particularly for enterprises with limited research budgets.

Opportunity:

Expansion in Zero Liquid Discharge

The zero liquid discharge (ZLD) sector presents substantial growth opportunities for industrial water circularity solution manufacturers due to increasing demand for complete wastewater elimination. Advanced treatment solutions offer a highly effective pathway to recover high-purity water and valuable minerals without compromising treatment efficacy, utilizing specialized membrane or thermal agents as primary inputs. As global investments in sustainable infrastructure expand and regulatory agencies favor circular water pathways, the adoption of advanced circularity solutions is expected to surge significantly.

Threat:

Competition from Traditional Discharge

The continuous reliance on conventional wastewater discharge technologies poses a

considerable threat to the industrial water circularity solutions market. Traditional treatment and disposal methods often exhibit superior cost-effectiveness under current industrial conditions and can be more economically viable for facilities with access to abundant freshwater resources. Additionally, the rapid advancement of basic treatment infrastructure is enhancing the efficiency of conventional discharge methods. This competitive pressure may hinder market penetration, particularly where initial capital investment is a primary operational consideration.

Covid-19 Impact:

The pandemic initially disrupted water circularity solution supply chains and delayed treatment facility deployments due to logistical constraints. However, the subsequent surge in focus on resource resilience accelerated the adoption of advanced circularity solutions to manage mounting water scarcity pressures. Post-pandemic, the heightened focus on supply chain resilience and sustainable material sourcing has reinforced long-term investments in circularity technologies, driving robust market recovery and expansion across diverse manufacturing sectors globally.

The water-as-a-service (WaaS) Subscription segment is expected to be the largest during the forecast period

The water-as-a-service (WaaS) Subscription segment is expected to account for the largest market share during the forecast period, due to its unparalleled financial flexibility and widespread applicability across diverse industrial environments. WaaS models offer exceptional operational efficiency and operate effectively in replacing capital-intensive infrastructure, which significantly reduces upfront investment and minimizes maintenance burdens in water management processes. As industries increasingly prioritize scalable and cost-effective resource recovery methods, the demand for specialized WaaS subscriptions continues to surge, thereby solidifying their dominant market position.

The valuable metals and minerals segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the valuable metals and minerals segment is predicted to witness the highest growth rate, driven by rapid advancements in extraction technology and materials science. These technologies enable the precise recovery of critical resources from complex wastewater streams to produce highly specialized and robust feedstocks tailored for specific manufacturing applications. The ability to enhance

recovery specificity, operational stability, and environmental compatibility through advanced extraction design significantly improves process economics. Consequently, increasing investments in green chemistry research and favorable regulatory frameworks are accelerating commercial adoption globally.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to the presence of well-established manufacturing industries and advanced water treatment infrastructure that heavily utilize industrial water circularity solutions. The region benefits from substantial research and development investments, robust intellectual property protection, and supportive government initiatives promoting circular economy principles and sustainable water management. Furthermore, the early adoption of advanced circularity technologies by key industry players in the United States and Canada reinforces the region's dominant position globally.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to rapid industrialization and expanding manufacturing sectors in emerging economies. Countries such as China, India, and Japan are increasingly investing in advanced water treatment infrastructure and sustainable manufacturing technologies to meet growing domestic water scarcity demands and stringent environmental regulations. Additionally, favorable government policies, rising foreign direct investment, and the availability of cost-effective research resources are collectively driving the accelerated adoption of circularity solutions across the region.

Key players in the market

Some of the key players in Industrial Water Circularity Solutions Market include Veolia Water Technologies, SUEZ (now part of Veolia), Xylem Inc., Evoqua Water Technologies, Pentair plc, Kurita Water Industries Ltd., Organo Corporation, Aquatech International LLC, IDE Technologies, Doosan Heavy Industries & Construction, Toray Industries, Inc., DuPont de Nemours, Inc. (Water Solutions), 3M Company (Water Filtration), Pall Corporation (Danaher), Lenntech B.V., Trojan Technologies, Fluence Corporation, and Biwater International.

Key Developments:

In September 2026, Veolia Water Technologies launched a next-generation zero liquid discharge system optimized for high-purity water recovery, achieving a thirty percent improvement in resource extraction efficiency while significantly reducing energy consumption requirements for global industrial facilities.

In August 2026, Xylem Inc. expanded its advanced membrane production capacity through a strategic partnership with a leading materials science firm, enabling the scalable manufacturing of novel filtration systems for sustainable water treatment.

In July 2026, DuPont de Nemours, Inc. secured a major supply agreement to provide customized ion exchange resins for a prominent mining producer, facilitating the efficient recovery of valuable metals from complex wastewater streams globally.

Deployment Models Covered:

- On-Premise / Owner-Operated
- Build-Own-Operate-Transfer (BOOT)
- Design-Build-Operate (DBO)
- Public-Private Partnerships (PPPs)
- Water-as-a-Service (WaaS) Subscription

Recovered Resources Covered:

- High-Purity Water
- Valuable Metals and Minerals
- Energy and Heat Recovery
- Nutrients and Bio-solids
- Reusable Chemicals

Technologies Covered:

Membrane Filtration (RO, NF, UF, MF)

Advanced Oxidation Processes (AOPs)

Thermal Evaporation and Crystallization

Biological Treatment and Bioreactors

Electrochemical Treatment

Constructed Wetlands and Natural Systems

Applications Covered:

Zero Liquid Discharge (ZLD) Systems

Process Water Reuse and Recycling

Cooling Tower Water Recycling

Wastewater Resource and Material Recovery

Stormwater Management and Reuse

Industry Verticals Covered:

Oil and Gas and Petrochemical

Power Generation

Food and Beverage Processing

Pharmaceuticals and Biotechnology

Mining and Metals

Textile and Pulp & Paper

Semiconductor and Electronics Manufacturing

End Users Covered:

Industrial Facility Operators and Owners

Municipal Water and Wastewater Authorities

Engineering, Procurement, and Construction (EPC) Contractors

Water-as-a-Service (WaaS) Providers

Environmental Consulting Firms

Other End Users

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

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL INDUSTRIAL WATER CIRCULARITY SOLUTIONS MARKET, BY DEPLOYMENT MODEL

- 5.1 On-Premise / Owner-Operated
- 5.2 Build-Own-Operate-Transfer (BOOT)
- 5.3 Design-Build-Operate (DBO)
- 5.4 Public-Private Partnerships (PPPs)
- 5.5 Water-as-a-Service (WaaS) Subscription

6 GLOBAL INDUSTRIAL WATER CIRCULARITY SOLUTIONS MARKET, BY RECOVERED RESOURCE

- 6.1 High-Purity Water
- 6.2 Valuable Metals and Minerals
- 6.3 Energy and Heat Recovery
- 6.4 Nutrients and Bio-solids
- 6.5 Reusable Chemicals

7 GLOBAL INDUSTRIAL WATER CIRCULARITY SOLUTIONS MARKET, BY TECHNOLOGY

- 7.1 Membrane Filtration (RO, NF, UF, MF)
- 7.2 Advanced Oxidation Processes (AOPs)
- 7.3 Thermal Evaporation and Crystallization
- 7.4 Biological Treatment and Bioreactors
- 7.5 Electrochemical Treatment
- 7.6 Constructed Wetlands and Natural Systems

8 GLOBAL INDUSTRIAL WATER CIRCULARITY SOLUTIONS MARKET, BY APPLICATION

- 8.1 Zero Liquid Discharge (ZLD) Systems
- 8.2 Process Water Reuse and Recycling
- 8.3 Cooling Tower Water Recycling
- 8.4 Wastewater Resource and Material Recovery

8.5 Stormwater Management and Reuse

9 GLOBAL INDUSTRIAL WATER CIRCULARITY SOLUTIONS MARKET, BY INDUSTRY VERTICAL

9.1 Oil and Gas and Petrochemical

9.2 Power Generation

9.3 Food and Beverage Processing

9.4 Pharmaceuticals and Biotechnology

9.5 Mining and Metals

9.6 Textile and Pulp & Paper

9.7 Semiconductor and Electronics Manufacturing

10 GLOBAL INDUSTRIAL WATER CIRCULARITY SOLUTIONS MARKET, BY END USER

10.1 Industrial Facility Operators and Owners

10.2 Municipal Water and Wastewater Authorities

10.3 Engineering, Procurement, and Construction (EPC) Contractors

10.4 Water-as-a-Service (WaaS) Providers

10.5 Environmental Consulting Firms

10.6 Other End Users

11 GLOBAL INDUSTRIAL WATER CIRCULARITY SOLUTIONS MARKET, BY GEOGRAPHY

11.1 North America

11.1.1 United States

11.1.2 Canada

11.1.3 Mexico

11.2 Europe

11.2.1 United Kingdom

11.2.2 Germany

11.2.3 France

11.2.4 Italy

11.2.5 Spain

11.2.6 Netherlands

11.2.7 Belgium

11.2.8 Sweden

- 11.2.9 Switzerland
- 11.2.10 Poland
- 11.2.11 Rest of Europe
- 11.3 Asia Pacific
 - 11.3.1 China
 - 11.3.2 Japan
 - 11.3.3 India
 - 11.3.4 South Korea
 - 11.3.5 Australia
 - 11.3.6 Indonesia
 - 11.3.7 Thailand
 - 11.3.8 Malaysia
 - 11.3.9 Singapore
 - 11.3.10 Vietnam
 - 11.3.11 Rest of Asia Pacific
- 11.4 South America
 - 11.4.1 Brazil
 - 11.4.2 Argentina
 - 11.4.3 Colombia
 - 11.4.4 Chile
 - 11.4.5 Peru
 - 11.4.6 Rest of South America
- 11.5 Rest of the World (RoW)
 - 11.5.1 Middle East
 - 11.5.1.1 Saudi Arabia
 - 11.5.1.2 United Arab Emirates
 - 11.5.1.3 Qatar
 - 11.5.1.4 Israel
 - 11.5.1.5 Rest of Middle East
 - 11.5.2 Africa
 - 11.5.2.1 South Africa
 - 11.5.2.2 Egypt
 - 11.5.2.3 Morocco
 - 11.5.2.4 Rest of Africa

12 STRATEGIC MARKET INTELLIGENCE

- 12.1 Industry Value Network and Supply Chain Assessment
- 12.2 White-Space and Opportunity Mapping

12.3 Product Evolution and Market Life Cycle Analysis

12.4 Channel, Distributor, and Go-to-Market Assessment

13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

13.1 Mergers and Acquisitions

13.2 Partnerships, Alliances, and Joint Ventures

13.3 New Product Launches and Certifications

13.4 Capacity Expansion and Investments

13.5 Other Strategic Initiatives

14 COMPANY PROFILES

14.1 Veolia Water Technologies

14.2 SUEZ (now part of Veolia)

14.3 Xylem Inc.

14.4 Evoqua Water Technologies

14.5 Pentair plc

14.6 Kurita Water Industries Ltd.

14.7 Organo Corporation

14.8 Aquatech International LLC

14.9 IDE Technologies

14.10 Doosan Heavy Industries & Construction

14.11 Toray Industries, Inc.

14.12 DuPont de Nemours, Inc. (Water Solutions)

14.13 3M Company (Water Filtration)

14.14 Pall Corporation (Danaher)

14.15 Lenntech B.V.

14.16 Trojan Technologies

14.17 Fluence Corporation

14.18 Biwater International

List of Tables

Table 1 Global Industrial Water Circularity Solutions Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Industrial Water Circularity Solutions Market Outlook, By Deployment Model (2023-2034) (\$MN)

Table 3 Global Industrial Water Circularity Solutions Market Outlook, By On-Premise / Owner-Operated (2023-2034) (\$MN)

Table 4 Global Industrial Water Circularity Solutions Market Outlook, By Build-Own-

Operate-Transfer (BOOT) (2023-2034) (\$MN)

Table 5 Global Industrial Water Circularity Solutions Market Outlook, By Design-Build-Operate (DBO) (2023-2034) (\$MN)

Table 6 Global Industrial Water Circularity Solutions Market Outlook, By Public-Private Partnerships (PPPs) (2023-2034) (\$MN)

Table 7 Global Industrial Water Circularity Solutions Market Outlook, By Water-as-a-Service (WaaS) Subscription (2023-2034) (\$MN)

Table 8 Global Industrial Water Circularity Solutions Market Outlook, By Recovered Resource (2023-2034) (\$MN)

Table 9 Global Industrial Water Circularity Solutions Market Outlook, By High-Purity Water (2023-2034) (\$MN)

Table 10 Global Industrial Water Circularity Solutions Market Outlook, By Valuable Metals and Minerals (2023-2034) (\$MN)

Table 11 Global Industrial Water Circularity Solutions Market Outlook, By Energy and Heat Recovery (2023-2034) (\$MN)

Table 12 Global Industrial Water Circularity Solutions Market Outlook, By Nutrients and Bio-solids (2023-2034) (\$MN)

Table 13 Global Industrial Water Circularity Solutions Market Outlook, By Reusable Chemicals (2023-2034) (\$MN)

Table 14 Global Industrial Water Circularity Solutions Market Outlook, By Technology (2023-2034) (\$MN)

Table 15 Global Industrial Water Circularity Solutions Market Outlook, By Membrane Filtration (RO, NF, UF, MF) (2023-2034) (\$MN)

Table 16 Global Industrial Water Circularity Solutions Market Outlook, By Advanced Oxidation Processes (AOPs) (2023-2034) (\$MN)

Table 17 Global Industrial Water Circularity Solutions Market Outlook, By Thermal Evaporation and Crystallization (2023-2034) (\$MN)

Table 18 Global Industrial Water Circularity Solutions Market Outlook, By Biological Treatment and Bioreactors (2023-2034) (\$MN)

Table 19 Global Industrial Water Circularity Solutions Market Outlook, By Electrochemical Treatment (2023-2034) (\$MN)

Table 20 Global Industrial Water Circularity Solutions Market Outlook, By Constructed Wetlands and Natural Systems (2023-2034) (\$MN)

Table 21 Global Industrial Water Circularity Solutions Market Outlook, By Application (2023-2034) (\$MN)

Table 22 Global Industrial Water Circularity Solutions Market Outlook, By Zero Liquid Discharge (ZLD) Systems (2023-2034) (\$MN)

Table 23 Global Industrial Water Circularity Solutions Market Outlook, By Process Water Reuse and Recycling (2023-2034) (\$MN)

Table 24 Global Industrial Water Circularity Solutions Market Outlook, By Cooling Tower Water Recycling (2023-2034) (\$MN)

Table 25 Global Industrial Water Circularity Solutions Market Outlook, By Wastewater Resource and Material Recovery (2023-2034) (\$MN)

Table 26 Global Industrial Water Circularity Solutions Market Outlook, By Stormwater Management and Reuse (2023-2034) (\$MN)

Table 27 Global Industrial Water Circularity Solutions Market Outlook, By Industry Vertical (2023-2034) (\$MN)

Table 28 Global Industrial Water Circularity Solutions Market Outlook, By Oil and Gas and Petrochemical (2023-2034) (\$MN)

Table 29 Global Industrial Water Circularity Solutions Market Outlook, By Power Generation (2023-2034) (\$MN)

Table 30 Global Industrial Water Circularity Solutions Market Outlook, By Food and Beverage Processing (2023-2034) (\$MN)

Table 31 Global Industrial Water Circularity Solutions Market Outlook, By Pharmaceuticals and Biotechnology (2023-2034) (\$MN)

Table 32 Global Industrial Water Circularity Solutions Market Outlook, By Mining and Metals (2023-2034) (\$MN)

Table 33 Global Industrial Water Circularity Solutions Market Outlook, By Textile and Pulp & Paper (2023-2034) (\$MN)

Table 34 Global Industrial Water Circularity Solutions Market Outlook, By Semiconductor and Electronics Manufacturing (2023-2034) (\$MN)

Table 35 Global Industrial Water Circularity Solutions Market Outlook, By End User (2023-2034) (\$MN)

Table 36 Global Industrial Water Circularity Solutions Market Outlook, By Industrial Facility Operators and Owners (2023-2034) (\$MN)

Table 37 Global Industrial Water Circularity Solutions Market Outlook, By Municipal Water and Wastewater Authorities (2023-2034) (\$MN)

Table 38 Global Industrial Water Circularity Solutions Market Outlook, By Engineering, Procurement, and Construction (EPC) Contractors (2023-2034) (\$MN)

Table 39 Global Industrial Water Circularity Solutions Market Outlook, By Water-as-a-Service (WaaS) Providers (2023-2034) (\$MN)

Table 40 Global Industrial Water Circularity Solutions Market Outlook, By Environmental Consulting Firms (2023-2034) (\$MN)

Table 41 Global Industrial Water Circularity Solutions Market Outlook, By Other End Users (2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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