

Water Recycle and Reuse Market Forecasts to 2032 – Global Analysis By Component (Equipment, and Chemicals), Water Source (Municipal Wastewater, Industrial Effluent, Agricultural Runoff, Greywater, and Stormwater & Rainwater Harvesting), Treatment Technology, Reuse Type, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Water Recycling and Reuse Market is accounted for \$30.8 billion in 2025 and is expected to reach \$69.0 billion by 2032, growing at a CAGR of 12.2% during the forecast period. The water recycling and reuse market delivers technologies and services to treat wastewater for industrial, agricultural, or potable reuse. Solutions include membrane filtration, advanced oxidation, biological treatment, and decentralized systems that conserve freshwater and reduce discharges. Urban water stress, stricter effluent rules, and circular water strategies drive adoption across municipalities and industries.

According to the World Bank, global water reuse capacity has tripled over the past 20 years and is expanding at nearly 7% annually.

Market Dynamics:

Driver:

Increasing water scarcity and drought conditions

Prolonged droughts and the rapid depletion of freshwater aquifers are creating

significant water stress for municipalities, agriculture, and industries globally. This scarcity is no longer a seasonal issue but a structural challenge, compelling governments and corporations to mandate and invest in water recycling. Furthermore, climate change intensifies this pressure, making water reuse a critical component of long-term resource security and resilience planning. Consequently, this driver is fundamentally shifting water from a utility to a valuable, reusable asset, directly accelerating market growth.

Restraint:

High initial investment and operational costs for recycling infrastructure

The substantial capital required for advanced treatment systems, including membrane bioreactors and reverse osmosis, presents a major barrier to entry. Additionally, the ongoing operational expenses for energy, membrane replacement, and skilled labor further strain budgets, particularly for smaller municipalities and industries. These high costs can make recycled water less economically attractive compared to conventional sources in the short term, often delaying project approvals and adoption. This financial hurdle remains a primary challenge that the industry must overcome through innovation and financing models.

Opportunity:

Growing adoption of smart water management

Smart systems enable real-time monitoring of water quality and system performance, allowing for predictive maintenance and optimized treatment processes. This not only reduces operational expenses but also enhances the reliability and safety of recycled water, building greater public and industrial trust. Moreover, this digital transformation creates new revenue streams for technology providers and positions water recycling as a modern, data-driven solution for sustainable water management.

Threat:

Competition from conventional water sources and desalination

In many regions, established conventional water sources, such as freshwater reservoirs and groundwater, benefit from entrenched infrastructure and lower perceived costs. Simultaneously, desalination, despite its high energy use, is often viewed as a more

direct solution for coastal areas. The persistent perception of recycled water as a less desirable option, coupled with the political and economic weight of existing water supply systems, poses a continuous threat. This competition can slow the policy shifts and public acceptance necessary for widespread recycling adoption.

Covid-19 Impact:

The pandemic initially disrupted the market, causing supply chain delays for critical components and halting construction of new treatment plants. However, it also brought home the importance of resilient and decentralized water systems, particularly in healthcare and water-intensive industries concerned with operational continuity. The crisis accelerated the adoption of digital monitoring solutions to manage facilities remotely. Ultimately, the long-term emphasis on hygiene and secure water supplies has reinforced the strategic importance of water recycling, fueling a rebound in project planning and investment.

The equipment segment is expected to be the largest during the forecast period

The equipment segment is expected to account for the largest market share during the forecast period, driven by the fundamental need for extensive physical infrastructure to treat wastewater to a reusable standard. This includes membranes, filters, pumps, and control systems that form the core of any recycling plant. Continuous technological advancements and the need for regular replacement of consumable components like membranes ensure a consistent, high-volume demand. Furthermore, large-scale municipal projects, which are heavily equipment-dependent, account for a significant portion of the market's capital expenditure, solidifying this segment's leading share.

The industrial effluent segment is expected to have the highest CAGR during the forecast period

During the forecast period, the industrial effluent segment is expected to grow the fastest because of strict environmental rules and the strong financial reasons for industries to lower their use of freshwater and waste disposal costs. Sectors like power generation, food & beverage, and chemicals are aggressively adopting zero-liquid-discharge (ZLD) systems to comply with policies and achieve corporate sustainability goals. Additionally, on-site water recycling allows industries to insulate themselves from water price volatility and scarcity, making it a strategic investment for operational resilience and cost control.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share. Stringent governmental regulations, such as those from the EPA, and well-established funding mechanisms for water infrastructure anchor this leadership. Furthermore, acute water scarcity in the American Southwest, particularly in states like California, drives robust adoption of water reuse practices in both municipal and agricultural sectors. The presence of major technology providers and a high level of public awareness regarding water conservation further consolidates North America's dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. Rapid industrialization, escalating water pollution, and supportive government initiatives in countries like China and India primarily drive this explosive growth. Massive populations and expanding urban centers are overwhelming existing water resources, creating an urgent need for sustainable solutions. Moreover, increasing investments in industrial water treatment to support manufacturing growth and address severe water scarcity issues position the Asia Pacific as the fastest-growing market for water recycling and reuse.

Key players in the market

Some of the key players in Water Recycle and Reuse Market include Veolia Environnement S.A., SUEZ S.A., Xylem Inc., Ecolab Inc., Pentair plc, Grundfos A/S, Alfa Laval AB, Kubota Corporation, Fluence Corporation Limited, DuPont de Nemours, Inc., Hitachi, Ltd., Kurita Water Industries Ltd., Toray Industries, Inc., IDE Technologies Ltd., Siemens AG, Jacobs Engineering Group Inc., and Aquatech International LLC.

Key Developments:

In March 2025, Veolia published a “Green Financing Framework” (March 2025) which explicitly lists “volume of water reused from collected and treated wastewater” as an impact metric under its Water / Blue-Financing category.

In July 2024, Ecolab received the Water Stewardship Verified (WAVE) certification from The Water Council, recognizing its robust enterprise-wide program for reducing, reusing, recycling, and replenishing water at high-risk sites and across global

operations. Ecolab aims to achieve a net positive water impact by 2030 and reported that, in 2023, it helped its customers conserve 226 billion gallons of water through stewardship and advanced reclaim systems focused on reuse and recycling. The company has set a goal to help customers save 300 billion gallons of water by 2030 using measures that include non-potable water use, advanced reclamation, and watershed restoration.

Components Covered:

Equipment

Chemicals

Water Sources Covered:

Municipal Wastewater

Industrial Effluent

Agricultural Runoff

Greywater

Stormwater and Rainwater Harvesting

Treatment Technologies Covered:

Primary Treatment

Secondary Treatment (Biological)

Tertiary/Advanced Treatment

Reuse Types Covered:

Non-Potable Reuse

Potable Reuse

End Users Covered:

Industrial

Commercial

Residential

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & 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 2024, 2025, 2026, 2028, and 2032
- 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

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Technology Analysis
- 3.7 End User Analysis
- 3.8 Emerging Markets
- 3.9 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL WATER RECYCLE AND REUSE MARKET, BY COMPONENT

- 5.1 Introduction
- 5.2 Equipment
 - 5.2.1 Filtration Systems
 - 5.2.2 Machinery
 - 5.2.3 Storage Tanks, Pipes & Drains
 - 5.2.4 Monitoring & Control Systems
 - 5.2.5 Other Equipment
- 5.3 Chemicals
 - 5.3.1 Coagulants and Flocculants
 - 5.3.2 Disinfectants
 - 5.3.3 Scale and Corrosion Inhibitors
 - 5.3.4 Antifoam Chemicals
 - 5.3.5 pH Conditioners

6 GLOBAL WATER RECYCLE AND REUSE MARKET, BY WATER SOURCE

- 6.1 Introduction
- 6.2 Municipal Wastewater
- 6.3 Industrial Effluent
- 6.4 Agricultural Runoff
- 6.5 Greywater
- 6.6 Stormwater and Rainwater Harvesting

7 GLOBAL WATER RECYCLE AND REUSE MARKET, BY TREATMENT TECHNOLOGY

- 7.1 Introduction
- 7.2 Primary Treatment
 - 7.2.1 Screening and Grit Removal
 - 7.2.2 Sedimentation/Clarification
- 7.3 Secondary Treatment (Biological)
 - 7.3.1 Activated Sludge Process
 - 7.3.2 Membrane Bioreactors (MBR)
 - 7.3.3 Trickling Filters
- 7.4 Tertiary/Advanced Treatment
 - 7.4.1 Membrane Filtration
 - 7.4.2 Disinfection

- 7.4.3 Advanced Oxidation Processes (AOPs)
- 7.4.4 Ion Exchange and Adsorption (Activated Carbon)

8 GLOBAL WATER RECYCLE AND REUSE MARKET, BY REUSE TYPE

- 8.1 Introduction
- 8.2 Non-Potable Reuse
 - 8.2.1 Agricultural and Landscape Irrigation
 - 8.2.2 Industrial Process Water and Cooling Water
 - 8.2.3 Toilet Flushing and Fire Protection
 - 8.2.4 Environmental/Wetland Enhancement
- 8.3 Potable Reuse
 - 8.3.1 Indirect Potable Reuse
 - 8.3.2 Direct Potable Reuse

9 GLOBAL WATER RECYCLE AND REUSE MARKET, BY END USER

- 9.1 Introduction
- 9.2 Industrial
 - 9.2.1 Power Generation
 - 9.2.2 Chemicals and Petrochemicals
 - 9.2.3 Oil & Gas
 - 9.2.4 Manufacturing
 - 9.2.5 Pulp & Paper
 - 9.2.6 Textiles
 - 9.2.7 Mining
- 9.3 Commercial
 - 9.3.1 Hotels
 - 9.3.2 Hospitals
 - 9.3.3 Office Parks
- 9.4 Residential

10 GLOBAL WATER RECYCLE AND REUSE MARKET, BY GEOGRAPHY

- 10.1 Introduction
- 10.2 North America
 - 10.2.1 US
 - 10.2.2 Canada
 - 10.2.3 Mexico

10.3 Europe

10.3.1 Germany

10.3.2 UK

10.3.3 Italy

10.3.4 France

10.3.5 Spain

10.3.6 Rest of Europe

10.4 Asia Pacific

10.4.1 Japan

10.4.2 China

10.4.3 India

10.4.4 Australia

10.4.5 New Zealand

10.4.6 South Korea

10.4.7 Rest of Asia Pacific

10.5 South America

10.5.1 Argentina

10.5.2 Brazil

10.5.3 Chile

10.5.4 Rest of South America

10.6 Middle East & Africa

10.6.1 Saudi Arabia

10.6.2 UAE

10.6.3 Qatar

10.6.4 South Africa

10.6.5 Rest of Middle East & Africa

11 KEY DEVELOPMENTS

11.1 Agreements, Partnerships, Collaborations and Joint Ventures

11.2 Acquisitions & Mergers

11.3 New Product Launch

11.4 Expansions

11.5 Other Key Strategies

12 COMPANY PROFILING

12.1 Veolia Environnement S.A.

12.2 SUEZ S.A.

- 12.3 Xylem Inc.
- 12.4 Ecolab Inc.
- 12.5 Pentair plc
- 12.6 Grundfos A/S
- 12.7 Alfa Laval AB
- 12.8 Kubota Corporation
- 12.9 Fluence Corporation Limited
- 12.10 DuPont de Nemours, Inc.
- 12.11 Hitachi, Ltd.
- 12.12 Kurita Water Industries Ltd.
- 12.13 Toray Industries, Inc.
- 12.14 IDE Technologies Ltd.
- 12.15 Siemens AG
- 12.16 Jacobs Engineering Group Inc.
- 12.17 Aquatech International LLC

List Of Tables

LIST OF TABLES

Table 1 Global Water Recycle and Reuse Market Outlook, By Region (2024–2032) (\$MN)

Table 2 Global Water Recycle and Reuse Market Outlook, By Component (2024–2032) (\$MN)

Table 3 Global Water Recycle and Reuse Market Outlook, By Equipment (2024–2032) (\$MN)

Table 4 Global Water Recycle and Reuse Market Outlook, By Filtration Systems (2024–2032) (\$MN)

Table 5 Global Water Recycle and Reuse Market Outlook, By Machinery (2024–2032) (\$MN)

Table 6 Global Water Recycle and Reuse Market Outlook, By Storage Tanks, Pipes & Drains (2024–2032) (\$MN)

Table 7 Global Water Recycle and Reuse Market Outlook, By Monitoring & Control Systems (2024–2032) (\$MN)

Table 8 Global Water Recycle and Reuse Market Outlook, By Other Equipment (2024–2032) (\$MN)

Table 9 Global Water Recycle and Reuse Market Outlook, By Chemicals (2024–2032) (\$MN)

Table 10 Global Water Recycle and Reuse Market Outlook, By Coagulants and Flocculants (2024–2032) (\$MN)

Table 11 Global Water Recycle and Reuse Market Outlook, By Disinfectants (2024–2032) (\$MN)

Table 12 Global Water Recycle and Reuse Market Outlook, By Scale and Corrosion Inhibitors (2024–2032) (\$MN)

Table 13 Global Water Recycle and Reuse Market Outlook, By Antifoam Chemicals (2024–2032) (\$MN)

Table 14 Global Water Recycle and Reuse Market Outlook, By pH Conditioners (2024–2032) (\$MN)

Table 15 Global Water Recycle and Reuse Market Outlook, By Water Source (2024–2032) (\$MN)

Table 16 Global Water Recycle and Reuse Market Outlook, By Municipal Wastewater (2024–2032) (\$MN)

Table 17 Global Water Recycle and Reuse Market Outlook, By Industrial Effluent (2024–2032) (\$MN)

Table 18 Global Water Recycle and Reuse Market Outlook, By Agricultural Runoff

(2024–2032) (\$MN)

Table 19 Global Water Recycle and Reuse Market Outlook, By Greywater (2024–2032) (\$MN)

Table 20 Global Water Recycle and Reuse Market Outlook, By Stormwater and Rainwater Harvesting (2024–2032) (\$MN)

Table 21 Global Water Recycle and Reuse Market Outlook, By Treatment Technology (2024–2032) (\$MN)

Table 22 Global Water Recycle and Reuse Market Outlook, By Primary Treatment (2024–2032) (\$MN)

Table 23 Global Water Recycle and Reuse Market Outlook, By Screening and Grit Removal (2024–2032) (\$MN)

Table 24 Global Water Recycle and Reuse Market Outlook, By Sedimentation/Clarification (2024–2032) (\$MN)

Table 25 Global Water Recycle and Reuse Market Outlook, By Secondary Treatment (Biological) (2024–2032) (\$MN)

Table 26 Global Water Recycle and Reuse Market Outlook, By Activated Sludge Process (2024–2032) (\$MN)

Table 27 Global Water Recycle and Reuse Market Outlook, By Membrane Bioreactors (MBR) (2024–2032) (\$MN)

Table 28 Global Water Recycle and Reuse Market Outlook, By Trickling Filters (2024–2032) (\$MN)

Table 29 Global Water Recycle and Reuse Market Outlook, By Tertiary/Advanced Treatment (2024–2032) (\$MN)

Table 30 Global Water Recycle and Reuse Market Outlook, By Membrane Filtration (2024–2032) (\$MN)

Table 31 Global Water Recycle and Reuse Market Outlook, By Disinfection (2024–2032) (\$MN)

Table 32 Global Water Recycle and Reuse Market Outlook, By Advanced Oxidation Processes (AOPs) (2024–2032) (\$MN)

Table 33 Global Water Recycle and Reuse Market Outlook, By Ion Exchange and Adsorption (Activated Carbon) (2024–2032) (\$MN)

Table 34 Global Water Recycle and Reuse Market Outlook, By Reuse Type (2024–2032) (\$MN)

Table 35 Global Water Recycle and Reuse Market Outlook, By Non-Potable Reuse (2024–2032) (\$MN)

Table 36 Global Water Recycle and Reuse Market Outlook, By Agricultural and Landscape Irrigation (2024–2032) (\$MN)

Table 37 Global Water Recycle and Reuse Market Outlook, By Industrial Process Water and Cooling Water (2024–2032) (\$MN)

Table 38 Global Water Recycle and Reuse Market Outlook, By Toilet Flushing and Fire Protection (2024–2032) (\$MN)

Table 39 Global Water Recycle and Reuse Market Outlook, By Environmental/Wetland Enhancement (2024–2032) (\$MN)

Table 40 Global Water Recycle and Reuse Market Outlook, By Potable Reuse (2024–2032) (\$MN)

Table 41 Global Water Recycle and Reuse Market Outlook, By Indirect Potable Reuse (2024–2032) (\$MN)

Table 42 Global Water Recycle and Reuse Market Outlook, By Direct Potable Reuse (2024–2032) (\$MN)

Table 43 Global Water Recycle and Reuse Market Outlook, By End User (2024–2032) (\$MN)

Table 44 Global Water Recycle and Reuse Market Outlook, By Industrial (2024–2032) (\$MN)

Table 45 Global Water Recycle and Reuse Market Outlook, By Power Generation (2024–2032) (\$MN)

Table 46 Global Water Recycle and Reuse Market Outlook, By Chemicals and Petrochemicals (2024–2032) (\$MN)

Table 47 Global Water Recycle and Reuse Market Outlook, By Oil & Gas (2024–2032) (\$MN)

Table 48 Global Water Recycle and Reuse Market Outlook, By Manufacturing (2024–2032) (\$MN)

Table 49 Global Water Recycle and Reuse Market Outlook, By Pulp & Paper (2024–2032) (\$MN)

Table 50 Global Water Recycle and Reuse Market Outlook, By Textiles (2024–2032) (\$MN)

Table 51 Global Water Recycle and Reuse Market Outlook, By Mining (2024–2032) (\$MN)

Table 52 Global Water Recycle and Reuse Market Outlook, By Commercial (2024–2032) (\$MN)

Table 53 Global Water Recycle and Reuse Market Outlook, By Hotels (2024–2032) (\$MN)

Table 54 Global Water Recycle and Reuse Market Outlook, By Hospitals (2024–2032) (\$MN)

Table 55 Global Water Recycle and Reuse Market Outlook, By Office Parks (2024–2032) (\$MN)

Table 56 Global Water Recycle and Reuse Market Outlook, By Residential (2024–2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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