

# **Boiler Water Treatment Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By End User Industry (Power, Oil & Gas, Food & Beverage Processing, Pharmaceutical, Textile Paper and Others), By Region & Competition, 2021-2031F**

<https://marketpublishers.com/r/B4FCA028F90AEN.html>

Date: January 2026

Pages: 185

Price: US\$ 4,500.00 (Single User License)

ID: B4FCA028F90AEN

## **Abstracts**

The Global Boiler Water Treatment Market is projected to expand from USD 5.68 Billion in 2025 to USD 9.75 Billion by 2031, exhibiting a compound annual growth rate of 9.42%. This sector entails the strategic use of chemical and physical methods to purify feedwater, effectively preventing scale buildup, corrosion, and carryover within industrial boiler setups. Growth is primarily fueled by substantial industrial development in emerging regions and the imperative to maximize power plant efficiency amidst rising global energy needs. Furthermore, the universal necessity to minimize operational interruptions and prolong capital equipment life ensures a consistent demand for these essential treatment protocols, independent of temporary industry fluctuations.

Despite these strong drivers, the market encounters significant hurdles due to increasingly strict environmental regulations regarding the disposal of chemically treated boiler blowdown. Adhering to these rigorous discharge standards often requires expensive supplementary treatment infrastructure, which can strain facility budgets. Nevertheless, reliance on traditional thermal systems remains extensive; the International Energy Agency noted in 2024 that renewable sources accounted for only 12% of global industrial heat usage, highlighting the persistent dominance of fossil-fuel boilers that necessitate comprehensive water treatment solutions.

## **Market Driver**

The growth of the global power generation sector acts as the primary catalyst for the

boiler water treatment market, driven by the continued dependence on thermal energy in rapidly developing economies. As nations expand infrastructure to satisfy soaring electricity demands, the installation of high-pressure boilers requires strict water conditioning to prevent mineral scaling and corrosion that impair heat transfer rates. This trend is illustrated by aggressive capacity additions in key industrial nations; for instance, the China Electricity Council's '2023-2024 Annual Report' from January 2024 indicates that the country's installed thermal power capacity grew by 57.93 GW in 2023. Such extensive infrastructure development ensures a continuous requirement for chemical inhibitors and monitoring systems to maintain system integrity under high thermal loads.

Concurrently, the rising focus on energy efficiency and operational optimization compels industrial operators to adopt treatment programs that minimize water wastage and fuel consumption. Poor water quality results in blowdown losses and scale deposits, which significantly reduce boiler thermal efficiency, prompting the adoption of technologies that enable higher cycles of concentration and water reuse. This operational shift is supported by major industry players delivering tangible sustainability outcomes; Ecolab's '2023 Growth and Impact Report' from June 2024 reveals that their water management solutions helped clients save over 220 billion gallons of water globally. Moreover, the broader industrial energy landscape reinforces this trajectory, as the Energy Institute reported in 2024 that global primary energy consumption reached a record high of 620 Exajoules during the previous year, underscoring the immense scale of thermal operations requiring optimized water treatment protocols.

## **Market Challenge**

Strict environmental regulations controlling the discharge of chemically treated boiler blowdown water pose a major obstacle that directly impedes the growth of the Global Boiler Water Treatment Market. Compliance with these rigorous disposal standards often mandates the installation of costly additional infrastructure, such as zero-liquid discharge systems, to manage effluent quality. This substantial capital expenditure diverts financial resources away from the expansion of core boiler capacities and the optimization of feedwater treatment regimes. Consequently, industrial operators face constrained operational budgets, leading to deferred maintenance or a reluctance to commission new fossil-fuel-based boiler systems, which ultimately restricts the demand for water treatment chemicals and services.

This financial strain is evident in the shifting investment priorities within the sector. According to the 'Water Environment Federation', in '2024', the industrial water reuse

market in North America is projected to grow at a compound annual growth rate of 8% through 2030. This rapid expansion highlights the industry's forced focus on back-end wastewater management technologies to meet regulatory requirements. As facilities channel increased funding into these compliance-driven discharge solutions, the capital available for front-end boiler water treatment procurement is effectively reduced, thereby decelerating the overall market's growth potential.

## **Market Trends**

The adoption of IoT-enabled real-time monitoring systems is fundamentally reshaping boiler operations by facilitating a transition from reactive troubleshooting to predictive maintenance. Industrial facilities are increasingly integrating smart sensors and cloud analytics to continuously track critical parameters such as conductivity and corrosion rates, allowing for precise, automated chemical dosing that prevents scale formation before it occurs. This digital transformation not only minimizes the frequency of manual inspections but also optimizes the consumption of treatment chemicals, directly enhancing operational margins for plant operators. The substantial market traction of these advanced technologies is reflected in recent financial performances; according to Veolia, February 2025, in the '2024 Annual Results', its Water Technologies division achieved an organic EBITDA growth of 15.7% in 2024, reaching €612 million, a surge driven largely by the robust demand for its engineering systems and service-based technologies.

Simultaneously, the growth of performance-based water management service models is shifting the market focus from simple chemical procurement to outcome-based contracts. In this commercial arrangement, treatment vendors are compensated based on tangible operational improvements, such as quantifiable water and energy savings, rather than solely on the volume of products supplied. This model aligns the financial incentives of providers with the sustainability targets of industrial clients, encouraging the implementation of strategies that maximize water reuse and thermal efficiency without requiring heavy upfront capital investment. This value-driven trajectory is gaining significant momentum; according to Solenis, April 2025, in the '2024 Sustainability Report', its ValueAdvantage partner program, which specifically quantifies operational and environmental benefits for clients, delivered \$257 million in documented value to customers globally in 2024.

## **Key Market Players**

Ecolab Inc.

SUEZ S.A.

Kurita Water Industries Ltd.

Solenis LLC

BASF SE

Kemira Oyj

Akzo Nobel N.V.

ChemTreat, Inc.

Buckman Laboratories International, Inc.

Thermax Limited

## Report Scope

In this report, the Global Boiler Water Treatment Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Boiler Water Treatment Market, By End User Industry

Power

Oil & Gas

Food & Beverage Processing

Pharmaceutical

Textile Paper and Others

### Boiler Water Treatment Market, By Region

## North America

United States

Canada

Mexico

## Europe

France

United Kingdom

Italy

Germany

Spain

## Asia Pacific

China

India

Japan

Australia

South Korea

## South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

### **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Boiler Water Treatment Market.

### **Available Customizations:**

Global Boiler Water Treatment Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### **Company Information**

Detailed analysis and profiling of additional market players (up to five).

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