

# **Water Free Urinals Market – Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Technology (Liquid Sealant Trap System, Valve Barrier System, Membrane Trap System), By Application (Office, Retail, Educational Facilities, Hospitality, Healthcare, Industrial, Others), By Region & Competition, 2019-2029F**

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## **Abstracts**

Global Water Free Urinals Market was valued at USD 347.19 million in 2023 and is projected to grow to USD 621.45 million by 2029, with a CAGR of 10.25% during the forecast period. The market's expansion stems from heightened awareness about water conservation and the increasing embrace of 'Green Building' standards. Waterless urinals, which look and function similarly to traditional urinals, avoid the use of water for flushing, saving large quantities of water per year per unit. This innovation is proving popular for its significant contribution to water-saving efforts. In the U.S. water-free urinal market of 2019, the liquid sealant trap system dominated technology adoption. Top manufacturers like Water Technologies and Waterless Co. Inc., along with the easy availability of consumables such as cartridges and sealant liquids, have boosted this segment's growth. Supplying and treating water incurs notable energy costs in building infrastructure, and thus water free urinal installations can achieve noteworthy energy savings, lower greenhouse gas emissions, and reduce overall operational expenses. Numerous governmental bodies, such as the U.S. Environmental Protection Agency (EPA) with its 'WaterSense' program initiated in June 2006, are encouraging water conservation by certifying and labeling efficient sanitary equipment and plumbing products. Moving forward, new materials like the polycarbonate used by Urimat Schweiz AG are emerging to offer solutions to the high costs of conventional raw materials such as Kaolin clay.

## Key Market Drivers

### Awareness and Adoption of Water Conservation Initiatives

The Global Water Free Urinals Market's growth is heavily influenced by increasing awareness and implementation of water conservation measures. Traditional urinals consume significant water for flushing, raising overall water requirements in commercial and public facilities. By eliminating the need for water, water free urinals present an attractive alternative for entities looking to improve their sustainability practices. Numerous government bodies are reinforcing water conservation efforts. For example, in 2006, the U.S. Environmental Protection Agency (EPA) launched its 'WaterSense' program, a voluntary partnership aiming to certify and label water-efficient sanitary ware and plumbing products, including urinals, toilets, and faucets. Such initiatives are pivotal in promoting the adoption of water free urinals by providing recognition and a structured framework that supports water-saving products. Additionally, the increasing implementation of 'Green Building' standards, which emphasize sustainable construction practices and the use of water-efficient fixtures, also propels market growth. As businesses and institutions strive to obtain green building certifications, the demand for waterfree urinals is anticipated to grow, driving positive market trends.

### Cost and Energy Efficiency

The cost and energy-efficiency attributes of water free urinals serve as another significant driver for market expansion. Traditional urinals come with substantial costs tied to water procurement, supply, treatment, and storage. By eliminating water use for flushing altogether, water free urinals can greatly diminish these costs. Furthermore, water free urinals are beneficial for energy conservation; the energy needed to pump and treat water is considerable, positioning water free urinals as a more energy-efficient option. This benefit is particularly critical in commercial and public buildings, where water use is high. Reducing water and energy consumption not only curtails operational costs but also aligns with broader sustainability goals. The environmental benefits, together with the financial incentives, make water free urinals an attractive choice for organizations intent on boosting operational efficiency and minimizing their environmental impact.

## Key Market Challenges

### High Maintenance Costs

A key hindrance in the Global Water Free Urinals Market is the high maintenance costs associated with certain technologies, notably the liquid sealant trap system. Despite its revenue-generating potential, the system's ongoing maintenance needs can deter some organizations. The recurring expenses for consumables like cartridges and sealant liquids can accumulate over time, detracting from the system's overall cost-effectiveness. Additionally, regular maintenance is necessary to maintain proper functionality and prevent odor issues, which can be labor-intensive and costly. This highlights the need for continuous innovation in materials and designs to mitigate maintenance costs and enhance the long-term viability of water free urinals. Tackling these maintenance-related challenges will be crucial for sustained market growth and wider technology adoption.

### Alternative Raw Materials

The high costs of essential raw materials, such as Kaolin clay, used in manufacturing many water free urinals pose another challenge. Market participants are, therefore, driven to seek alternative materials. For instance, Urimat Schweiz AG manufactures its water free urinals using polycarbonate material. Although these alternative materials can help reduce overall costs, they require extensive testing and certification to ensure they meet durability and efficiency standards. This process can be both time-consuming and costly, potentially slowing the introduction and acceptance of new materials and technologies in the market. Finding a balance between raw material costs and the production of high-quality, durable products that satisfy consumer expectations and regulatory requirements remains a challenge. As the market expands, discovering innovative material solutions that address these cost concerns while upholding product quality will be pivotal for sustained development.

### Key Market Trends

#### Growing Adoption of Advanced Technologies

The Global Water Free Urinals Market is witnessing increasing adoption of advanced technologies, especially the valve barrier system and membrane trap system. This technology is favored for its durability and low maintenance, as it does not necessitate cartridge replacement. Additionally, the valve barrier system boasts a superior flow rate compared to the membrane trap system, making it a popular choice among consumers. The membrane trap system is also gaining traction due to its compatibility with a variety of cleaning chemicals and absence of sealant liquid. This system's durability and low

maintenance make it an appealing option for many organizations. Cartridges based on membrane trap technology can also convert traditional urinals into water free ones, driving further adoption. Advancements and increasing adoption of these technologies will continue to play a crucial role in the market's evolution. For instance, In 2022, 62.1% of enterprises surveyed in the 2022 Survey of Advanced Technology (SAT) implemented at least one type of advanced technology. Adoption rates were highest in the utilities sector (80.5%), followed by professional, scientific, and technical services (75.2%), finance and insurance (75.1%), and manufacturing (74.9%). Among the 15 advanced technology domains assessed in the 2022 SAT, advanced design and information control technologies (35.0%) and clean technologies (33.4%) were the most widely adopted. This growing emphasis on advanced and clean technologies has spurred increased demand for water-free urinals, aligning with the broader trend towards sustainability and resource efficiency in various industries.

### Shift Towards Environmentally Sustainable Solutions

Another vital trend in the Global Water Free Urinals Market is the growing shift towards environmentally sustainable solutions. The rising emphasis on green building standards and water conservation initiatives is driving demand for water free urinals. These units offer a sustainable alternative to conventional water-consuming fixtures, aligning with overarching environmental goals. As organizations and institutions increasingly prioritize sustainability, the adoption of waterfree urinals is expected to rise. According to the survey, clean technologies encompass processes, devices, or applications aimed at reducing the environmental impact of human activities and enhancing ecosystem sustainability. The most widely adopted clean technologies include waste management, reduction, or recycling 26.9% and air and environmental protection or remediation 10.8%. These factors further enhance the market during the forecast

This trend is further supported by regulatory frameworks and government initiatives that encourage water efficiency. The U.S. Environmental Protection Agency's (EPA) 'WaterSense' program, for instance, provides certification and labeling for water-efficient products. Such initiatives not only elevate awareness about the advantages of water free urinals but also incentivize their adoption. The increasing focus on sustainability and environmental conservation will continue to drive the market, positioning water free urinals as key elements of modern, eco-friendly building practices.

### Segmental Insights

## Application Insights

The office segment led the Global Water Free Urinals Market. The surge in constructing energy-efficient office spaces drives demand within this segment. Moreover, the refurbishment of older office buildings is anticipated to bolster product demand over the forecast period. Modern offices that prioritize sustainable solutions aim to reduce operational costs and achieve green building certifications. Water free urinals, which contribute to both water and energy savings, are increasingly being adopted in office buildings. This focus on reducing operational expenses while enhancing sustainability makes the office segment a significant contributor to market growth.

## Regional Insights

The Asia Pacific region dominated the Global Water Free Urinals Market. Robust demand from the retail and office application segments in emerging economies such as India, China, and Vietnam drives this dominance. Regulatory support for water-efficient sanitary ware fuels market growth in this region. Rapid urbanization and industrial growth in these nations elevate demand for sustainable building solutions, including water free urinals. With regulatory frameworks promoting water conservation, the Asia Pacific region is expected to uphold its market leadership.

## Key Market Players

Falcon Water Technologies, LLC,

Waterless Co. Inc.

Duravit AG

URIMAT Schweiz AG

Villeroy & Boch AG

Kohler Co.

Sloan Valve Company

Zurn Elkay Water Solutions Corporation

LIXIL Corporation

Ekam Eco Solutions Pvt. Ltd.

#### Report Scope:

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

Water Free Urinals Market, By Technology:

Liquid Sealant Trap System

Valve Barrier System

Membrane Trap System

Water Free Urinals Market, By Application:

Office

Retail

Educational Facilities

Hospitality

Healthcare

Industrial

Others

Water Free Urinals Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

Asia-Pacific

China

India

Japan

South Korea

Australia

Indonesia

South America

Brazil

Colombia

Argentina

Middle East & Africa

Saudi Arabia

UAE

South Africa

Turkey

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Water Free Urinals Market.

### Available Customizations:

Global Water Free Urinals Market 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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