

Water Treatment Chemicals and Technology Market to Reach \$ 275.3 Bn, Expanding at a CAGR of 4.2% by 2035 | TMR Research

Water Treatment Chemicals and Technology Market 2035 Rising Global Water Scarcity and Growing Demand for Clean Water drives Growth

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-- The global [water treatment chemicals and technology market](#) is a fundamental and critical sector, valued at US\$ 172.9 Bn in 2024. This market is at the forefront of addressing the growing global water crisis by providing essential solutions for purification, recycling, and conservation. It encompasses a wide range of products and processes, including chemicals for coagulation, flocculation, and disinfection, as well as advanced technologies like membrane filtration and UV sterilization. The market is projected for significant growth over the next decade, with a forecast to grow at a Compound Annual Growth Rate (CAGR) of 4.2% from



Water Treatment Chemicals and Technology Market

2025 to 2035. This robust growth is expected to drive the market value to a notable US\$ 275.3 Bn by the end of 2035. This substantial expansion is fueled by the increasing scarcity of freshwater resources, strict regulatory mandates, and rising industrial demand. This report provides a detailed overview of the key factors driving this market, its various applications, and the regional dynamics shaping its trajectory.

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Key Market Drivers and Trends

The growth of the water treatment chemicals and technology market is propelled by a confluence of global and regional factors.

Growing Water Scarcity and Demand: The increasing global population, coupled with rapid urbanization and industrialization, has placed immense pressure on freshwater resources. This scarcity is a primary driver, necessitating the adoption of advanced water treatment technologies to ensure a safe and sustainable water supply for domestic, industrial, and agricultural use. In many parts of the world, a significant portion of the population lacks access to clean drinking water, making effective treatment solutions a top priority for governments and organizations alike.

Strict Regulatory Frameworks: Governments and international bodies are implementing more stringent regulations regarding wastewater discharge and drinking water quality. These mandates are compelling industries to invest in sophisticated water treatment systems to comply with environmental standards. Regulatory bodies, such as the Environmental Protection Agency (EPA) in the United States and the European Union's Water Framework Directive, play a crucial role in shaping market demand for both chemical and technological solutions.

Industrial Growth and Water-Intensive Processes: Industries such as oil & gas, power generation, mining, and food & beverage are significant consumers of water. These sectors require a continuous supply of high-purity water for their operations and must also treat their wastewater before discharge to prevent pollution. The expansion of these industries, particularly in developing economies, is driving the demand for specialized water treatment solutions.

Technological Advancements: The market is witnessing continuous innovation. New technologies, such as advanced membrane filtration (reverse osmosis, ultrafiltration), UV disinfection, and smart water management systems, are becoming more efficient and cost-effective. These advancements are enabling the treatment of highly contaminated water and the recycling of wastewater for reuse, thus reducing the strain on freshwater sources.

Market Segmentation by Product Type

The market for water treatment chemicals and technologies is diverse, with solutions tailored to different stages of the treatment process.

Chemicals:

Coagulants and Flocculants: These chemicals are used to remove suspended solids, turbidity, and organic matter from water. They play a vital role in the initial stages of treatment, preparing the water for further purification.

Corrosion and Scale Inhibitors: Used primarily in industrial water systems, these chemicals prevent the buildup of scale and the corrosion of pipes and equipment, thereby extending the lifespan of infrastructure and improving operational efficiency.

Disinfectants and Biocides: Chlorine, chlorine dioxide, and ultraviolet (UV) light are commonly used to neutralize harmful microorganisms like bacteria, viruses, and parasites, making the water safe for consumption. The rising concern over waterborne diseases is a key factor driving this segment.

pH Adjusters: Chemicals like lime and soda ash are used to control the pH levels of water, which is critical for the effectiveness of other treatment processes and for preventing corrosion.

Technology:

Membrane Filtration: This segment includes technologies like reverse osmosis (RO), ultrafiltration (UF), microfiltration (MF), and nanofiltration (NF). These membranes act as highly selective filters, removing impurities based on size, and are widely used for desalination and the production of high-purity water.

UV Disinfection: This non-chemical process uses ultraviolet light to inactivate pathogens by damaging their DNA. It is highly effective, environmentally friendly, and is gaining popularity as an alternative or a supplement to chemical disinfection.

Activated Carbon: Activated carbon filters are highly effective at removing organic compounds, chlorine, and other contaminants that can cause foul tastes and odors in water.

Market Segmentation by Application

Water treatment solutions are applied across a spectrum of sectors, each with its unique requirements.

Municipal Water Treatment: This segment is the largest application area, focusing on treating water from lakes, rivers, and other sources to make it safe for public consumption and household use.

Industrial Water Treatment: Industries require water for various processes, including cooling, boiler feed, and manufacturing. Water treatment solutions are critical for optimizing these processes, ensuring compliance with environmental regulations, and enabling wastewater reuse.

Power Generation: Power plants, especially thermal and nuclear facilities, require vast quantities of high-purity water for cooling towers and boilers.

Oil & Gas: The oil and gas industry uses large volumes of water for drilling, hydraulic fracturing, and other processes. Water treatment is essential for managing produced water, a byproduct of extraction, which is often highly contaminated.

Food & Beverage: This sector requires extremely high-quality water for product formulation and cleaning. Water treatment solutions are used to ensure the safety and quality of food and beverage products and to prevent contamination.

Regional Market Dynamics

The water treatment market exhibits distinct dynamics across different regions.

Asia-Pacific: This region is the largest and fastest-growing market, driven by rapid industrialization, urbanization, and a high population density. Countries like China, India, and Indonesia are investing heavily in water infrastructure and wastewater treatment facilities to address rising demand and environmental concerns.

North America: The North American market is mature and characterized by stringent regulations and a focus on advanced technologies for water reuse and conservation.

Europe: Europe is another major market, with a strong emphasis on sustainability and circular economy principles. The region is a leader in adopting innovative technologies for water recycling and waste-to-energy solutions.

Latin America and Middle East & Africa (LAMEA): These regions are emerging markets with significant growth potential. The Middle East, in particular, is a key market for desalination technologies due to its acute water scarcity.

Competitive Landscape and Future Outlook

The global water treatment chemicals and technology market is highly competitive, featuring a mix of large multinational corporations and specialized regional players. Key market participants include Suez, Veolia, Dow Water & Process Solutions, BASF, Ecolab, and Kurita Water Industries. These companies are focused on R&D to develop more efficient and sustainable solutions.

Akzo Nobel

Dow Water & Process Solutions

BASF SE

Emerson

Ashland Hercules

GE Tech

KSB Corporation

Grundfos

Kirloskar Ebara
Pentair
KITZ Corp.
Flowserve Corporation
Ecolab
SUEZ Water Technologies & Solutions
Kemira
Kurita Water Industries Ltd.
Veolia Water Technologies
Solenis
Ion Exchange India Ltd.
SNF Group
BWA Water Additives
DuPont Water Solutions
Others

The future of the market is promising, driven by a global shift towards a circular economy for water. The increasing focus on water reuse, resource recovery (e.g., extracting phosphorus and nitrogen from wastewater), and smart water management will create new opportunities. The integration of digital technologies, such as IoT and AI, will lead to smarter, more efficient treatment plants, enabling real-time monitoring and predictive maintenance. As the world confronts the dual challenges of water scarcity and environmental pollution, the water treatment chemicals and technology market will play an increasingly vital role in ensuring a sustainable future.

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