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ANMD-MRS10-100

INDUSTRIAL ZERO-LIQUID-DISCHARGE (ZLD) SYSTEMS

A Global Sustainability Due Diligence and Market Research Study

Shortened Table of Contents

Market Snapshot

US$ 8,800.0m 2025A market value	**US$ 9,354.8m** 2026E market value	**US$ 13,500.0m** 2032F market value	**6.3%** CAGR 2025A to 2032F
7 regions Geographic coverage	**19 modules** Country modules	**896 exhibits** Including 143 charts	**211 + 102** Organizations and patent records
2020–2032 Historical data and forecasts		**Global** Regional and country coverage	

Report Facts

Report Attribute	Coverage
Report code	ANMD-MRS10-100 | Advanced Water Technologies
Published	September 2026
Study periods	History 2020H to 2024H | Actual 2025A | Estimate 2026E | Forecast 2027F to 2032F
Length	343 pages | 34 chapters | 7 appendices | 896 exhibits including 143 charts
Geography	7 regions | 19 country modules | Residual regional groupings
Segmentation	5 process-train architectures plus process stage, application, recovery objective, end user, business model and scale
Directories	211 organizations based in 26 countries | 102 patent records in 8 jurisdictions
Licences	Single-User License (SUL) | Global Corporate License (GCL)

This shortened table of contents presents the chapter architecture, main sections and selected exhibits. The detailed table of contents and sample pages are available to registered users at www.anewmarketdynamics.com.

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Part I

Study Framework, Executive Brief and Global Market

Study conventions, headline market findings, the global market model and the regional analytical foundation.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
1	**About This Report** Methodology and quality control • Reader's guide and reporting conventions • Scope rules and water-technology boundary • Units, currency and evidence grades • Analytical overlays and double-count controls		1
2	**Executive Market Brief** Key market developments • Market in brief and outlook in five statements • Regional and country market outlook • Policy and classification environment • Key findings, risks and adoption constraints • Stakeholder implications and indicators **Selected exhibits** *Exhibit 1: Global ZLD Market — Headline Metrics, 2025A and 2032F | Exhibit 4: Selected ZLD Industry Milestones*	4	2
3	**Executive Summary and Market Metrics Dashboard** What changed this year • What the market is worth and why • Regional and country opportunity ranking • Policy and classification outlook • Where the risks are • KPI dashboard with ranges **Selected exhibits** *Exhibit 5: Global ZLD System Market Value, 2020H–2032F (Chart) | Exhibit 10: ZLD KPI Dashboard — Indicative Ranges*	6 2 charts	5
4	**Global Market — Dynamics, Size and Outlook** Industry background and participant map • Market drivers and restraints • Opportunities and strategic frameworks • Global market size and forecast • Process-train boundary and deployment pathways • Unit, flow and project-value conversion **Selected exhibits** *Exhibit 11: Industry Participant Map | Exhibit 12: Porter's Five Forces — Industrial ZLD Systems*	9 2 charts	8
5	**Regional Markets — Seven-Region Overview** Regional dashboard • Value and share comparison • Regional demand character • Regional opportunity ranking • Regional water-stress map **Selected exhibits** *Exhibit 23: Regional Share and CAGR | Exhibit 24: Regional Water-Stress and Demand Drivers*	5 1 chart	16
6	**How to Read the Country Modules** Module structure and conventions • Full-format and consolidated modules • Data bases and rounding • Country-module requirements		18

Part II

Regional, Country, Segmentation and Demand Analysis

Seven regional chapters and 19 country modules, then the master series, global segmentation, demand signals and enablers.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
7	**North America — Regional Analysis and Country Modules** Regional overview and dashboard • United States • Canada • Mexico • Rest of North America • Country comparison **Highlights** *Power-sector effluent guidelines in the United States, mining and oil-sands brine in Canada, and industrial reuse under northern water stress in Mexico*	127 21 charts	19
8	**Europe — Regional Analysis and Country Modules** Regional overview and dashboard • Germany • Spain • Italy • France • Rest of Europe • Country comparison **Highlights** *Thermal-separation OEM base in Germany and France, drought-led reuse in Spain, and textile and chemical districts in Italy*	165 27 charts	57
9	**Asia Pacific — Regional Analysis and Country Modules** Regional overview and dashboard • China • India • South Korea • Japan • Singapore • Rest of Asia Pacific • Country comparison **Highlights** *Coal-chemical zero-discharge permits in China, cluster mandates in India, complex-driven demand in South Korea, membranes in Japan and estate reuse in Singapore*	203 33 charts	106

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No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
10	**Latin America — Regional Analysis and Country Modules** Regional overview and dashboard • Chile • Brazil • Rest of Latin America • Country comparison **Highlights** *Copper and lithium brine in Chile, and mining, ethanol and chemicals in Brazil*	**89** 15 charts	**167**
11	**Africa — Regional Analysis and Country Modules** Regional overview and dashboard • South Africa • Egypt • Rest of Africa • Country comparison **Highlights** *Acid-mine-drainage treatment in South Africa, and new industrial cities and reuse in Egypt*	**89** 15 charts	**194**
12	**Middle East — Regional Analysis and Country Modules** Regional overview and dashboard • Saudi Arabia • United Arab Emirates • Israel • Rest of Middle East • Country comparison **Highlights** *Desalination brine and mineral recovery in Saudi Arabia, free-zone demand in the UAE, and reuse and brine-concentration technology in Israel*	**127** 21 charts	**221**
13	**Rest of World — Regional Analysis and Country Modules** Regional overview • Composition and market character • Value and outlook **Selected exhibits** *Exhibit 825: Rest of World — Segment Reading, 2025A | Exhibit 826: Rest of World ZLD Value, Panel A: 2020H–2026E (US$ Million)*	**3**	**260**
14	**Global Market Reporting — Master Series and Reference Tables** Global master series • Regional master series • Country reference tables **Selected exhibits** *Exhibit 828: Global Master Series, Panel A: 2020H–2026E (mixed) | Exhibit 832: Country Reference Series, Panel A: 2020H–2026E (US$ Million)*	**6**	**261**
15	**Global Segmentation Analysis** Product-type segmentation and primary market split • Secondary segmentation • Overlay axes • Full annual segment series • Cross-tabulation and additivity rules **Selected exhibits** *Exhibit 834: Global 2026E Value Share by Primary Segment (Chart) | Exhibit 842: Primary Segment CAGR, 2025A–2032F*	**11** 2 charts	**264**
16	**Demand Signals and Forward Indicators** Structural demand signals • Cluster enforcement and brine-valorization pipelines • Economic and adoption signals • Indicator dashboard • Leading indicators **Selected exhibits** *Exhibit 845: Leading Indicator Dashboard | Exhibit 847: Leading Indicator Thresholds to Watch*	**3** 1 chart	**269**
17	**Adjacent-Market Enablers** Adjacent enabler landscape and interfaces • Enabling infrastructure and platforms • Financing and service enablers • Process-train interfaces **Selected exhibits** *Exhibit 848: Adjacent Enablers and Interfaces*	**1**	**271**

Part III

Competition, Engineering, Innovation, Sustainability and Policy

Company profiles, competitive structure, transactions, engineering, research, sustainability due diligence, value chain and policy.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
18	**Competitive Analysis and Company Profiles** Market shares and concentration reading • Company profiles across North America, Europe, Asia Pacific and the Middle East • Component, technology and specialist participants • Distribution, service and delivery organizations **Selected exhibits** *Exhibit 849: Competitive Structure — Participant Classes*	**19**	**272**
19	**Competitive Environment — Structure, Rankings and Matrices** Market structure and concentration reading • Directory-evidence presence rankings • Capability matrices • Competitive outlook • Benchmark **Selected exhibits** *Exhibit 868: Directory-Evidence Presence — Leading Integrated Participants | Exhibit 869: Capability Matrix — Architecture Coverage (Selected Participants)*	**3**	**282**
20	**Mergers, Acquisitions, Partnerships and Industry Network Analysis** M&A record • Partnership and alliance patterns • Industry network reading • Ecosystem map **Selected exhibits** *Exhibit 871: Selected Transaction and Consolidation Record*	**1**	**284**

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No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
21	**Product, System Engineering and Innovation** System configuration comparison • Standards and design-code frame • Water-quality and application fit • Materials, durability and circularity • Innovation frontier and next-generation technology **Selected exhibits** *Exhibit 872: System Configuration Comparison*	1	285
22	**Research, Innovation and Funding Environment** Public research programs and brine-mining science • Startup and venture activity • Standards and testing infrastructure • Funding pipeline **Selected exhibits** *Exhibit 873: Research and Funding Landscape*	1	288
23	**Sustainability Due Diligence, ESG, SDG and Climate Analysis** Environmental, water and social analysis • Double materiality and ESG framework alignment • SDG contribution mapping • Climate risk and adaptation • Anti-greenwashing screen • Energy, brine, salt and lifecycle analysis **Selected exhibits** *Exhibit 874: Sustainability Outcome Evidence by Application*	1	289
24	**Value Chain, Supply Chain and Geopolitical Analysis** Value-chain map • Material inputs • Components and electronics • Manufacturing and delivery footprints • Trade measures and localization • Logistics and delivery capacity **Selected exhibits** *Exhibit 875: ZLD Value Chain* | *Exhibit 876: Manufacturing and Delivery Footprint*	2	300
25	**Policy, Regulation, Legal Structures and Integrated Risk** Water-governance and utility-regulatory frameworks • Program architecture by jurisdiction • Standards and certification • Legal structures for delivery • Integrated policy risk reading **Selected exhibits** *Exhibit 878: Jurisdiction Comparison — ZLD Policy Intensity*	2	302

Part IV

Risk, Economics, Implementation and Outlook

Observed outcomes, SWOT and risk, stakeholder patterns, community outcomes, economics, outlook, KPIs and directories.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
26	**Scenario Analysis and Observed Outcome Patterns** Observed outcome patterns from projects and deployments • Long-term outlook ranges • Outcome benchmark	2 1 chart	304
27	**Strategic SWOT and TOWS Analysis** SWOT • TOWS strategic options **Selected exhibits** *Exhibit 881: SWOT — Industrial ZLD Systems* | *Exhibit 882: TOWS Strategic Options*	2	306
28	**Risk Factors Identified** Integrated risk register • Likelihood-and-impact reading • Mitigants and watch indicators **Selected exhibits** *Exhibit 883: Integrated Risk Register*	1	307
29	**Observed Implementation Patterns by Stakeholder** Manufacturers and providers • Distributors, integrators and installers • End users and buyer organizations • Governments and programs • Financiers and insurers		308
30	**Community Engagement and Social Inclusion** Access and inclusion models • Gender and labor dimensions • Benefit-sharing patterns • Community outcomes		309
31	**Pricing, System Economics and Financing** System cost structure • Buyer economics and payback • Financing context and instruments • Total cost of ownership and recovery economics **Selected exhibits** *Exhibit 884: Delivered-Cost Drivers* | *Exhibit 885: Indicative Delivered-Cost Weighting (Illustrative) (Chart)*	2 1 chart	310

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No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
32	**Outlook Synthesis** Where value concentrates to 2032 • What could change the path • Threshold events **Selected exhibits** *Exhibit 886: Thermal vs Hybrid Value Crossover to 2032F (Chart)*	**1** 1 chart	**312**
33	**Key Performance Indicators** Market KPIs • Sustainability KPIs • Delivery KPIs • ZLD KPI library **Selected exhibits** *Exhibit 887: Market KPIs*	**1**	**313**
34	**Company and Patent Directories — Overview** Directory method and coverage • Patent register method and coverage • Directory fields and evidence register **Selected exhibits** *Exhibit 888: Directory Coverage by Region*	**1**	**314**

Appendices

Reference material, directories and registers supporting the main study.

Coverage	Exhibits	Page
Glossary of Terms and Abbreviations Definitions of terms, units and abbreviations used across the study	**1**	**315**
Corporate Directory 211 organizations by country, region and structural role	**1**	**316**
Patent Directory 102 patent records with assignee, jurisdiction and mapped segment	**2**	**332**
Projects, Policies and Case-Study Register Projects, programs and policies by jurisdiction, type and status	**1**	**340**
KPI Dictionary, Data Schema and Evidence Register KPI definitions, units and data schema	**1**	**341**

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