

# Wastewater Treatment Plants

## ANMD-MRS10-094 · Water & Environmental Technologies

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

### WHY THIS REPORT

Wastewater treatment plants are the foundation of public health and environmental protection — converting sewage and industrial effluent into safe discharge or reusable water across activated-sludge, membrane bioreactor, sequencing-batch-reactor, decentralised packaged and resource-recovery designs. This decision-grade study sizes the global market three ways — value, treatment capacity (MLD) and plants — across treatment technology, plant configuration and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

### SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Wastewater plants protect public health and ecosystems while recovering water, energy and nutrients — central to the circular water economy.

#### Mapped Sustainable Development Goals:

<b>SDG 6</b> Clean Water & Sanitation	<b>SDG 9</b> Industry, Innovation & Infrastructure	<b>SDG 11</b> Sustainable Cities & Communities	<b>SDG 12</b> Responsible Consumption	<b>SDG 13</b> Climate Action
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#### Measurable sustainability outcomes assessed:

- Cleaner waterways and public-health protection
- Energy, nutrient and water resource recovery
- Platform for water reuse
- Energy use, sludge and discharge impacts as material risks

**Framework alignment:** Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

### WHAT'S INSIDE AT A GLANCE

<b>53</b> Chapters	<b>9</b> Report Parts	<b>7</b> Regions Covered	<b>40+</b> Country Markets
<b>2025–32</b> Forecast Horizon	<b>4</b> Forward Scenarios	<b>25+</b> Companies Profiled	<b>5</b> SDGs Mapped

### REPORT COVERAGE

**Geographic scope:** North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. Asia Pacific dominates new build; Europe leads resource recovery; the Americas modernise infrastructure; other regions assessed on their own merits.

## MARKET OVERVIEW

### From compliance cost to resource hub — where treatment plants recover water, energy and nutrients.

Wastewater treatment is moving from compliance cost to a resource-recovery and reuse platform. Demand is driven by tightening discharge standards, sanitation gaps and circular-economy goals across Asia Pacific, Europe and the Americas. The market is read three ways — value, treatment capacity and plants — and forecast under four scenarios, each region reported separately.

- **Asia Pacific dominates new build** — China, India, Japan and Australia, on urbanisation, sanitation expansion and tightening standards
- **Europe leads resource recovery** — Germany, France and the Netherlands, where energy-neutral and nutrient-recovery plants are most advanced
- **Americas modernise infrastructure** — United States and Canada, on reinvestment in ageing plants and nutrient-removal upgrades
- **Reuse and recovery are the differentiators** — MBR-grade effluent and biogas, nutrient and water recovery turn plants from cost centres into resource hubs

## REGIONAL OUTLOOK

Across seven reporting regions, the report separates leading markets from high-growth and emerging ones — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Asia Pacific	New-build leader	China, India, Japan, Australia — urbanisation, sanitation, standards
Europe	Resource-recovery leader	Germany, France, Netherlands — energy-neutral, nutrient recovery
North America	Modernising	United States, Canada — plant renewal, nutrient upgrades
Middle East	Reuse-led	Saudi Arabia, UAE — reuse, irrigation supply
Latin America	Emerging	Brazil, Chile — sanitation gaps, urban coverage
Africa	Frontier	South Africa, Egypt, Kenya — sanitation access, blended finance

## KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> <li>• Tightening discharge &amp; nutrient limits</li> <li>• Sanitation &amp; urbanisation expansion</li> <li>• Water-reuse &amp; circular-economy goals</li> <li>• Energy &amp; nutrient resource recovery</li> <li>• Decentralised &amp; packaged-plant demand</li> </ul>	<ul style="list-style-type: none"> <li>• High CAPEX &amp; long asset life-cycles</li> <li>• Energy use &amp; sludge-management burden</li> <li>• Ageing infrastructure &amp; funding gaps</li> <li>• Skilled-operator &amp; maintenance needs</li> <li>• Permitting &amp; community-siting constraints</li> </ul>

## SEGMENTATION SNAPSHOT

<b>By Treatment Technology</b>	Activated-sludge · membrane bioreactor (MBR) · sequencing batch reactor (SBR) · packaged · resource-recovery
<b>By Plant Configuration</b>	Centralised · decentralised · packaged / modular
<b>By Application</b>	Municipal · industrial · commercial & residential
<b>By End User</b>	Utilities · municipalities · industry · buildings
<b>By Business Model</b>	Equipment sales · EPC · Water-as-a-Service
<b>By Scale</b>	Decentralised · commercial · municipal / utility-scale

## TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

### Part I — Report Foundation, Discovery and Strategic Intelligence

- > Chapter 1. Scope, Methodology and Report Architecture
- > Chapter 2. Industry Discovery Summary — Wastewater Treatment Plants
- > Chapter 3. Executive Intelligence and Decision Dashboard
- > Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

### Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- > Chapter 5. Industry Overview and Market Evolution
- > Chapter 6. Market Dynamics
- > Chapter 7. Global Market Size and Forecast, 2020–2032
- > Chapter 8. Market Segmentation Analysis
- > Chapter 9. End-User and Demand-Side Intelligence
- > Chapter 10. Pricing, Cost and Commercial Model Intelligence

### Part III — Regional and Country Intelligence

- > Chapter 11. Global Regional Intelligence Framework
- > Chapter 12. North America Market Intelligence
- > Chapter 13. Europe Market Intelligence
- > Chapter 14. Asia Pacific Market Intelligence
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- > Chapter 17. Middle East Market Intelligence
- > Chapter 18. Rest of World Market Intelligence

### Part IV — Technology, Innovation and Category-Specific Intelligence

- > Chapter 19. Technology Landscape and Architecture
- > Chapter 20. Emerging and Next-Generation Technology Intelligence
- > Chapter 21. Category-Specific Intelligence Module
- > Chapter 22. Research, Innovation and Funding Landscape

## Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

## Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
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- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

## Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
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## Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

## Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

## COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans global water majors, biological-process specialists, and resource-recovery and packaged-plant innovators. Deal activity — plant upgrades, resource-recovery projects and packaged-system wins — signals a market consolidating around reuse and recovery.

### Representative players profiled in the full report:

Veolia Environnement S.A. · SUEZ SA · Xylem Inc. · Ovivo Inc. · Aquatech International LLC · and 20+ further profiled players across water majors and resource-recovery innovators.

**Investment intelligence:** venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a conditional investment view.

## KEY QUESTIONS THIS REPORT ANSWERS

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- How large is the global wastewater treatment plant market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- How do reuse and resource recovery change plant economics versus compliance-only treatment?
- Who leads, and where is the competitive and patent white space?
- Is the investment case bankable — and under what conditions?
- How does the category align with the SDGs, circular water economy and disclosure regulation?

## WHY ANMD — THE DIFFERENCE

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*Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability view in a single architecture.*

- **Triangulated sizing** — every market read three ways so value, volume and the physical-unit views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment view.

## WHO SHOULD BUY THIS REPORT

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Investors, manufacturers, developers, utilities, lenders and policymakers, and strategic corporate planners and decision-makers.

### Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com) · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

### Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com). The full detailed table of contents will be sent directly to your registered company email address.