

## 폐수처리 서비스 시장; 유형별 (설계 및 엔지니어링 컨설팅, 건물 및 설치, 운영 및 프로세스 제어, 유지관리 및 수리), 최종 사용자별 (도시, 산업 및 지역) - 2024년까지 글로벌 전망

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### 개요

폐수처리 서비스 시장 규모는 2019 년에 485 억 달러였으며 2024 년에는 연평균 성장률 6.1%와 함께 651 억 달러에 이를 것으로 예상된다. 폐수는 가정과 산업에서 사용된 물이나 하수도를 포함한다. 폐수는 재사용하거나 환경으로 배출하기 위해 처리된다.

#### Attractive Opportunities in the Wastewater Treatment Services Market



e-estimated, p-projected

처리된 물의 품질은 TDS (total dissolved solids)의 영향력, 경도, 수소(pH)의 잠재력 및 알칼리성과 같은 매개변수에 따라 결정된다. 치료 과정에는 화학적 처리, 정착 작업, 증발, 여과 등 많은 작업이 수반된다. 산업폐수는 전력, 석유 및 가스, 화학약품, 식품, 펄프 & 종이, 광업과 같은 산업에서 나온다. 서비스의 종류는 산업마다 요건과 한계점이 다르기 때문에 최종사용에 따라 달라진다.

수질오염의 증가와 물의 부족은 모든 지역의 폐수 처리 서비스 시장을 이끄는 주요 요인이다. 수자원의 부재나 이용가능성은 물의 재사용이나 이용자의 치료 선택에 영향을 미친다. 수질과 담수자원 폐기, 방류 규제 강화로 전 세계 폐수처리 시장의 성장을 견인하고 있다. 규제와 지침은 다른 지역에 비해 북미와 유럽에서 더욱 엄격하다.

다양한 지역의 시장 성장도 지역의 경제 상황에 따라 좌우된다. 예를 들어, 유럽 국가들의 경기 침체는 산업 생산에 영향을 미쳤고, 그 결과 산업 부문의 폐수 처리 시장의 성장에 악영향을

미쳤다. 폐수처리 서비스 시장은 아시아 태평양 지역이 가장 크고, 북미와 유럽이 그 뒤를 잇고 있다.

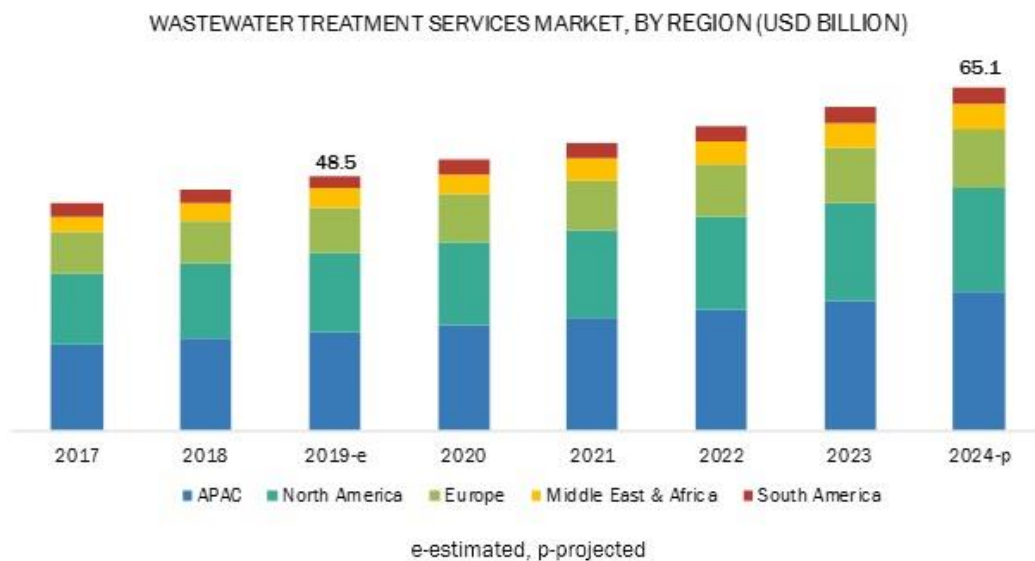
**발전은 예측 기간 중 가장 빠른 성장 할 것이다.**

폐수처리 서비스 시장은 최종 사용산업을 바탕으로 화학, 의약품, 석유 및 가스, 식품, 펄프앤페이퍼, 금속&광업, 발전 등으로 세분화되었다. 발전 부문은 세계 폐수 처리 서비스 시장에서 가장 높은 수익 성장을 기록할 것으로 추산된다. 폐수 처리 서비스에 대한 수요는 전 세계적으로 매우 높다.

탄소 배출의 정해진 목표를 달성하기 위한 시도로, 많은 나라들은 풍력이나 태양 에너지와 같은 재생 에너지원에 많은 투자를 시작했다. 이러한 투자는 지난 몇 년 동안 발전 산업의 물 보존 프로젝트에서 목격되었다. 아시아 태평양은 전세계 전력 수요의 40% 이상을 차지한다. 70% 이상의 발전은 증기 터빈 기술에 의해 수행된다. 인도, 중국, 인도네시아, 베트남 등 국가의 전력 수요가 증가할 것으로 예상됨에 따라 폐수 처리 서비스 시장은 상당한 성장을 보일 것이다.

**도시 부문은 예측 기간 동안 폐수 처리 서비스의 최종 사용자가 가장 큰 부분을 차지할 것으로 예상된다.**

주거용 폐수는 일반적으로 시립폐수처리장을 통해 처리된다. 시 부문은 2018 년 전체 폐수 처리 서비스 시장에서 가장 큰 비중을 차지했다. 세계적으로 증가하는 인구는 처리된 물의 수요를 증가시켰다. 수자원의 부족은 폐수 처리와 물 재활용 서비스의 필요성을 증가시켜 폐수 처리 서비스 시장을 증가시켰다.



아시아 태평양은 예측 기간 동안 전 세계 폐수 처리 서비스 시장에서 가장 큰 비중을 차지한다.

아시아 태평양은 가치 측면에서 예측 기간 동안 폐수 처리 서비스에서 가장 큰 시장 점유율을 차지할 것으로 예상된다. 이는 전국 시도와 발전 산업에서 폐수 처리 서비스에 대한 수요가 증가하고 있기 때문이다. 게다가, 그 지역의 산업용 폐수에 대한 규범을 정비하는 것뿐만 아니라, 증가하는 도시 쓰레기, 물 부족은 아시아 태평양에서의 폐수 처리 서비스의 성장을 주도해 왔다.

### 시장 주요 참여 업체

보고서에서 언급된 주요 업체로는 Veolia (France), SUEZ (France), Xylem (US), Ecolab (India), Evoqua Water Technologies (US), Thermax (India), and W.O.G. Group (US), Golder Associates (Canada), EnviroSystems Inc. (Canada), and SWA Water Holdings (Australia) 등이 있다.

Veolia (France)는 폐수 처리 서비스의 선도적인 서비스 제공업체 중 하나이다. 이 회사는 지표수, 더러운 물 또는 바닷물, 지하수, 폐수, 폐수 슬러지를 취급한다. 2018년에는 2667 개의 폐수처리공장을 성공적으로 운영하여 6 천 3 백만 명의 인구를 전 세계 폐수시스템 공장에 연결하였다. 이 회사는 유럽, 미주, 아시아, 오세아니아, 중동, 그리고 다른 지역에서 운영되고 있다.

Xylem (US)은 물 및 폐수 응용을 위해 설계된 용액의 제조와 서비스를 담당하는 수기술 분야의 선두 기업 중 하나이다. 그 회사는 전세계적으로 포트폴리오와 지역적 지위를 확장하기 위해 인수합병에 적극적으로 투자한다. 폐수처리 서비스 수요가 많은 시장을 공략해 아시아 태평양 지역에서의 존재감을 넓히는 것을 목표로 하고 있다.

이 보고서는 세계 폐수처리서비스 시장을 서비스 유형, 최종사용 산업, 지역별로 분류하고 있다.

### 서비스 유형별:

- 설계 및 엔지니어링 컨설팅
- 건물 및 설치 서비스
- 운영 및 프로세스 제어
- 유지보수 및 수리
- 기타

### 최종 사용 산업별:

- 도시

- 산업용
  - 화학약국
  - 오일&가스
  - 식품, 펄프 & 종이
  - 금속 & 광업
  - 전력생성
  - 기타
  
- 지역별:
  - 아시아 태평양
  - 북미
  - 유럽
  - 중동 및 아프리카
  - 남미

보고서에서 다루는 주요 질문

- 시장에 영향을 미치는 주요 개발 사항은?
- 중장기적으로 모든 발전이 업계를 어디로 이끌 것인가?
- 증가하는 폐수 처리 서비스 유형은 무엇인가?
- 폐수처리 서비스의 새로운 최종 사용 산업은 무엇인가?
- 예측 기간 동안 시장 성장에 영향을 미치는 주요 요인은 무엇인가?

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□ 보고서 문의

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## Wastewater Treatment Services Market by Type (Design & Engineering Consulting, Building & Installation, Operation & Process Control, Maintenance & Repair), End User (Municipal, Industrial), and Region - Global Forecast to 2024

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### Summary

The wastewater treatment services market size is projected to reach USD 65.1 billion by 2024 from an estimated USD 48.5 billion in 2019, at a CAGR of 6.1%. Wastewater includes used water or sewerage water from households and industries. Wastewater is treated for reuse or for discharging it into the environment.

### Attractive Opportunities in the Wastewater Treatment Services Market



e-estimated, p-projected

The quality of treated water depends on parameters such as the presence of total dissolved solids (TDS), hardness, the potential of hydrogen (pH) level, and alkalinity. The treatment process involves many operations such as chemical treatment, settling operation, evaporation, filtration, and others. Industrial wastewater comes from industries such as power, oil & gas, chemical & pharma, food, pulp & paper, and mining. The type of service depends on the end-use because the requirements and challenges are different for different industries.

Increasing water pollution and scarcity of water are major factors driving the wastewater treatment services market in all the regions. The absence or availability of water resources also affects the reuse of water or its treatment choices of users. Declining water quality & freshwater resources and increasing regulations on discharging water are pushing the growth of the wastewater treatment

market all over the world. The regulations and guidelines are more stringent in North America and Europe as compared to other regions.

The growth of the market in various regions is also dependent on the economic condition of the region. For instance, the economic slowdown in European countries impacted industrial production and, in turn, adversely affected the growth of the wastewater treatment market in the industrial sector. APAC is the largest market for wastewater treatment services, followed by North America and Europe.

Power generation to witness the fastest growth during the forecast period.

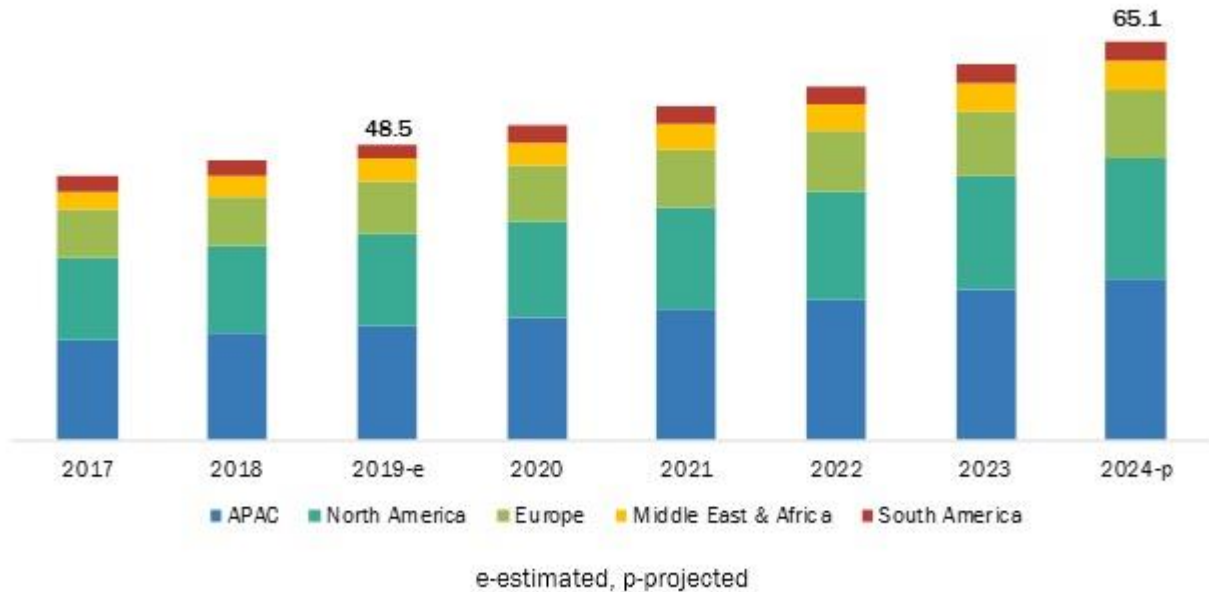
Based on end-use industry, the wastewater treatment services market has been segmented into chemical, pharmaceutical, oil & gas, food, pulp & paper, metal & mining, and power generation, and others. The power generation segment is estimated to register the highest revenue growth within the global wastewater treatment services market. The demand for wastewater treatment services is very high in power generation across the globe.

In an attempt to meet the set targets of carbon emission, many countries have started investing heavily in renewable energy sources, such as wind and solar energy. The investments have been witnessed in the water conservation projects in the power generation industry, in the past few years. APAC accounts for over 40% of the global power demand. Over 70% of power generation is carried out by the steam turbines technology. As the demand for power in countries including India, China, Indonesia, and Vietnam is projected to increase, the wastewater treatment services market will witness substantial growth

The municipal segment is expected to be the largest by end-user of wastewater treatment services during the forecast period.

The residential wastewater is treated generally through the municipal wastewater treatment plant. The municipal segment accounted for the largest share of the total wastewater treatment services market in 2018. The growing population, globally, has increased the demand for treated water. The scarcity of water resources has increased the need for more wastewater treatment and water recycling services, thus, increasing the wastewater treatment services market.

WASTEWATER TREATMENT SERVICES MARKET, BY REGION (USD BILLION)



APAC to account for the largest share of the global wastewater treatment services market during the forecast period

APAC is expected to account for the largest market share in wastewater treatment services during the forecast period, in terms of value. This is owing to the increasing demand for wastewater treatment services from municipals and power generation industries in the country. Moreover, increasing municipal wastage, water scarcity, as well as straighten norms for industrial wastewater in the region, has been driving the growth of wastewater treatment services in APAC.

### Key Market Players

The key market players profiled in the report include as Veolia (France), SUEZ (France), Xylem (US), Ecolab (India), Evoqua Water Technologies (US), Thermax (India), and W.O.G. Group (US), Golder Associates (Canada), EnviroSystems Inc. (Canada), and SWA Water Holdings (Australia).

Veolia (France) is one of the leading services providers of wastewater treatment services. The company treats surface water, brackish or seawater, groundwater, wastewater, and wastewater sludge. In 2018, the company successfully managed 2,667 wastewater treatment plants, connecting 63 million people to wastewater systems plants across the globe. The company operates in Europe, the Americas, Asia, Oceania, the Middle East, and other regions.

Xylem (US) is one of the leading company in water technology which engages in the manufacturing and service of engineered solutions for water and wastewater applications. The company invests vigorously in mergers and acquisitions to expand its portfolio and regional presences across the globe. The company aims to expand its presence in the APAC region by targeting the market where the demand for wastewater treatment services is high.



## Scope of the Report

Report Metric	Details
Years considered for the study	2017-2024
Base year considered	2018
Forecast period	2019–2024
Units considered	Value (USD Million)
Segments covered	ServiceType, End-use Industry, and Region
Regions covered	APAC, North America, Europe, Middle East & Africa, and South America
Companies profiled	Veolia (France), SUEZ (France), Xylem (U.S.), Ecolab (U.S.), Evoqua Water Technologies (U.S.), Thermax Group (India), WOG Group (U.S.), Golder Associates (Canada), Swa Water Holdings (Australia), EnviroSystems (Canada) Top 20 major players covered

This report categorizes the global wastewater treatment services market based on service type, end-use industry, and region.

By service type:

- Design & engineering consulting
- Building & Installation Service
- Operation & Process Control
- Maintenance & Repair
- Others

By end-use industry:

- Municipal
- Industrial
  - Chemical & Pharma
  - Oil & Gas
  - Food, Pulp & Paper



- Metal & Mining
- Power Generation
- Others

By region:

- APAC
- North America
- Europe
- Middle East & Arica
- South America

**Key Questions addressed by the report**

- What are the major developments impacting the market?
- Where will all the developments take the industry in the mid to long term?
- Which are the growing service types of wastewater treatment services?
- What are the emerging end-use industries of wastewater treatment services?
- What are the major factors impacting market growth during the forecast period?

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