

# Produced Water Treatment Market to Reach US\$ 216.5 Bn by 2035, Driven by Tech Advancements and Opportunities | TMR

*Produced Water Treatment Market to hit US\$ 216.5 Bn by 2035, driven by tech innovations, stricter regulations, and rising oil & gas wastewater management needs.*

WILMINGTON, DE, UNITED STATES, August 20, 2025 /EINPresswire.com/ -- The global [produced water treatment market](#) is gaining prominence as the oil

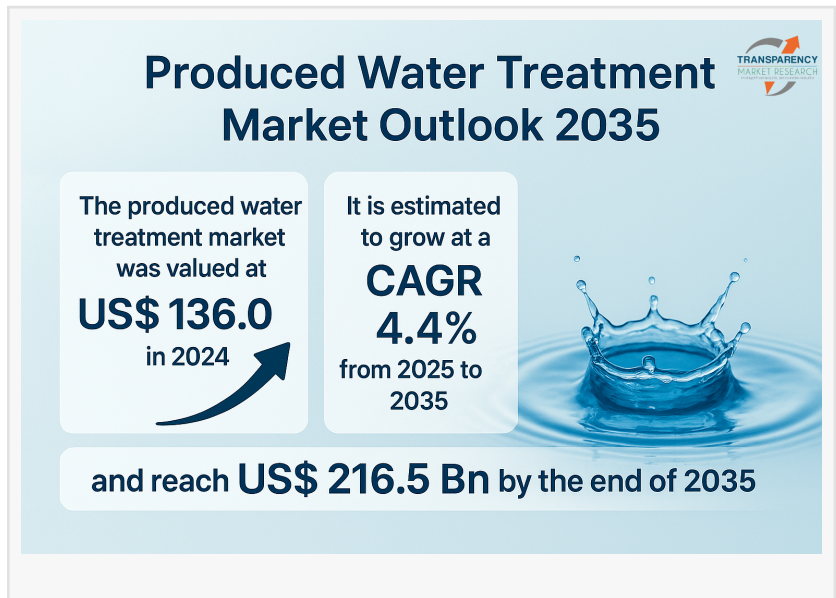
and gas industry grapples with rising environmental concerns, water scarcity, and the need for efficient resource management. Valued at US\$ 136.0 billion in 2024, the market is

projected to expand at a compound annual growth rate (CAGR) of 4.4% between 2025 and 2035, reaching US\$ 216.5 billion by the end of the forecast period. This growth trajectory is fueled by the urgent need to address the challenges posed by untreated produced water, which contains hydrocarbons, heavy metals, salts, radioactive materials, and other harmful contaminants. These pollutants pose risks to human health, ecosystems, and regulatory compliance if discharged untreated.

Produced water treatment technologies are increasingly being adopted to remove contaminants, facilitate water reuse, and comply with environmental standards. The treated water can be reused for industrial and agricultural applications, reinjected into oil fields to optimize production, or safely discharged. This article explores the drivers, technological advancements, regional market dynamics, and competitive landscape shaping the produced water treatment industry through 2035.

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## Analysts' Viewpoint

Analysts expect the produced water treatment market to grow steadily due to the rising demand from the oil and gas sector, which accounts for the bulk of produced water generation. As oil and gas reserves mature, water-to-oil ratios increase, leading to higher volumes of produced water requiring treatment. Effective treatment not only ensures regulatory compliance but also reduces operational costs by enabling water reuse and minimizing disposal requirements.

With advancements in separation technologies, biological processes, and membrane systems, produced water treatment is transitioning from being a regulatory necessity to a strategic opportunity for operators aiming to optimize field development and sustainability practices.

## Revenue Growth and Technological Developments

Produced water treatment involves a combination of physical, chemical, thermal, and biological technologies depending on the contaminant profile and intended reuse of the treated water.

### Key Technologies:

Membrane processes: Reverse osmosis, nanofiltration, and ultrafiltration are widely used for desalination and contaminant removal.

Oil removal: Gravity separators, coalescing filters, and hydrocyclones are applied to separate oil droplets from water.

Organic contaminant removal: Advanced oxidation processes and biological treatment address dissolved organic matter.

Integrated solutions: Combined treatment systems are increasingly popular for achieving high water quality standards.

Membrane bioreactors, electro-dialysis, and zero-liquid discharge (ZLD) systems are also being deployed for challenging environments such as offshore oil fields. These technologies not only facilitate compliance but also enhance operational efficiency by enabling reuse in hydraulic fracturing, steam generation, and cooling processes.

## Market Drivers

### Addressing Global Water Scarcity

Water scarcity is a critical challenge facing industries worldwide. With freshwater resources under immense pressure from population growth, urbanization, and industrial activity, reusing treated produced water provides a sustainable alternative. Advanced treatment systems allow produced water to meet stringent quality standards, enabling its reuse in agriculture, industrial cooling, or aquifer recharge.

By reducing freshwater withdrawals, treated produced water relieves pressure on local water

bodies and groundwater aquifers, preserving these resources for municipal and drinking purposes. In regions such as the Middle East and Africa, where arid conditions intensify water scarcity, the reuse of produced water is vital for both environmental sustainability and industrial continuity.

### Ongoing Investments in Oil and Gas Exploration

The expansion of oil and gas exploration—particularly in unconventional reservoirs such as shale gas, tight oil, and deepwater fields—directly drives demand for produced water treatment. These reserves generate larger volumes of contaminated water compared to conventional fields. The adoption of technologies such as hydraulic fracturing and horizontal drilling further accelerates produced water volumes, necessitating robust treatment solutions.

Rising global energy demand, especially in emerging economies, ensures continued exploration and production (E&P) activities. This trend underpins the demand for advanced produced water management systems to meet environmental regulations and enhance sustainability. Technologies like nanofiltration, reverse osmosis, and advanced oxidation are critical for recycling water within oil and gas operations, reducing reliance on freshwater resources.

### Produced Water Treatment Market by End Use

The oil and gas sector dominates the produced water treatment market, generating the largest volumes of wastewater during hydrocarbon extraction. Regulatory pressure, sustainability goals, and the need for enhanced oil recovery (EOR) are pushing operators to adopt sophisticated water treatment solutions.

Treated produced water is increasingly being reinjected into reservoirs for pressure maintenance and EOR applications, further driving demand. With global energy needs continuing to grow, the oil and gas industry remains the primary end-use segment for produced water treatment technologies.

Other end-use segments include industrial and power generation applications, where treated water is reused for cooling, boiler feed, and other operational needs. However, oil and gas will continue to represent the bulk of demand through 2035.

### Regional Insights

#### Middle East & Africa: Market Leader

The Middle East and Africa (MEA) region leads the global produced water treatment market, accounting for 43.4% of global share in 2024. The region's dominance is driven by massive oil and gas production activities in countries such as Saudi Arabia, the UAE, Kuwait, and Nigeria. These nations not only generate substantial volumes of produced water but also face acute

water shortages, making water reuse imperative.

The presence of mature oil fields, which generate higher water-to-oil ratios, adds to the need for treatment technologies. Governments and national oil companies are prioritizing sustainable water management, investing heavily in advanced treatment technologies such as membrane filtration, evaporation, and solar-powered treatment systems.

## North America

North America, particularly the United States, represents another significant market. The shale boom and widespread use of hydraulic fracturing have increased the volume of produced water, driving demand for advanced treatment solutions. Regulatory frameworks and growing emphasis on environmental compliance further strengthen the adoption of water treatment technologies.

## Asia-Pacific

Asia-Pacific is expected to witness strong growth due to rising energy demand and expanding exploration activities in countries such as China, India, and Indonesia. Water scarcity issues across the region will accelerate adoption of produced water treatment technologies.

## Europe and Latin America

Europe emphasizes sustainability and compliance with stringent environmental regulations, fostering the adoption of innovative technologies for produced water treatment. In Latin America, countries like Brazil and Venezuela are expanding oil and gas production, contributing to increased demand for treatment solutions.

## Competitive Landscape

The produced water treatment market is highly competitive, with major players offering end-to-end solutions and leveraging technological expertise. Key players include:

**Veolia:** Offers membrane filtration, evaporation, and water reuse technologies tailored to upstream oil and gas applications. Its emphasis on sustainability and cost-effective solutions helps customers meet regulatory standards.

**Schlumberger Limited:** Provides integrated water management services, combining advanced separation processes with real-time monitoring. Its expertise in reservoir engineering enables comprehensive water handling solutions.

**Siemens Energy AG, CETCO Energy Services, TechnipFMC Plc, Halliburton, Ovivo, Enviro-Tech Systems, Produced Water Solutions, and Pentair** are other notable players.

These companies focus on R&D, global expansion, and strategic partnerships to enhance market presence and deliver sustainable water treatment solutions.

## Market Developments

Recent projects highlight innovation and regional investments in produced water treatment:

Oman (August 2024): Heliovis launched a solar water treatment project in Dhofar, using solar energy to treat highly saline, oil-contaminated produced water.

Iraq (September 2023): Cannon Artes delivered a treatment package for the West Qurna-2 oil field, capable of treating 200,000 barrels per day.

Saudi Arabia (March 2023): Saudi Aramco and Almar Water Solutions initiated construction of the Zuluf water treatment plant with a capacity of 185,000 cubic meters per day.

These projects underscore the global momentum toward adopting innovative, large-scale produced water treatment technologies.

## Market Snapshot

Market Size (2024): US\$ 136.0 billion

Forecast Value (2035): US\$ 216.5 billion

CAGR (2025-2035): 4.4%

Leading Region: Middle East & Africa (43.4% share)

Key End-use Segment: Oil & Gas

Major Players: Veolia, Schlumberger, Siemens Energy AG, TechnipFMC, Halliburton, Ovivo, Pentair, Enviro-Tech Systems, CETCO Energy Services

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