MI LATAM Insights

Industrial water in Argentina

Eight business families

MIO-WATER-AR-001 | C1 | 22 octubre 2026 /22 October 2026

Free-access insight

Argentina combines supply and pumping, process water, thermal efficiency, effluent and reuse, consumables, engineering, services and analytics. Eight families and 40 subsegments organise economic mechanisms, not 40 separately sized markets. The study focuses on solutions for private industrial buyers, with public context kept separate.

No complete private national TAM, market shares or guaranteed profitability.

Content and use

Magnitudes and limits, structure and competition, contract economics and reproducible scenarios for comparing supply, treatment and reuse.

Executive overview

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Water filtration/purification imports under HS 842121 reached USD 24.214 million in 2024. Value rose 2.30% and items 180.51% versus 2023: product mix prevents reading this as installed industrial capacity. Spain accounted for 58.27% of 2024 items, signalling composition. [AR03-05]

On 21 October 2026, Neuquén reported 11 reuse and 11 productive proposals from 11 operators. Evaluation creates potential needs for trials, characterisation and treatment, without proving orders, awarded budgets or revenue. Argentine analysis requires basin, process and contract boundaries rather than national water multiplied by one price. [AR30]

What changes the market interpretation

Imports are not TAM

The 2022-2024 series retains Argentina as reporter, imports, World partner and H0 nomenclature. Values are nominal thousandUSD, not inflation-adjusted. Products can serve households, municipalities and industry. The code excludes many chemicals, civil works, engineering and services. [AR03-05]

Currency and avoidable savings

The scenario computes useful volume=feed×recovery×availability; net annual saving=useful volume×(avoided-variable cost)-fixed cost. NPV=-initial investment+discounted cash flows. Avoidable cost must be marginal: not all billed charges disappear with reuse. Include reject, sludge, energy, monitoring and maintenance where relevant.

Method, example and limits

Entirely hypothetical constant ARS base:10000 m³/year feed,70% recovery,90% availability,2500 ARS/m³avoided,800 ARS/m³variable,ARS 3 million fixed/year,ARS 20 million capex,5 years and 12% real rate. It yields 6300 usefulm³ andARS7.71 million net/year; NPV ARS 7.793 million and breakeven avoidedcost 2156.86 ARS/m³. It is not derived from the offers or a quoted plant.

Public documentary research with 22 October 2026 cutoff, without contacts, interviews, surveys, spending or external tests. The register separates relevant review, commercial summaries, partial access and a located source not fully read. Several company pages are not independent sources. No representative seller/buyer sample was constructed.

The full edition includes 40 subsegments, 50 references, six offers, expanded Discovery and a reproducible tool. Individual ES/EN licence.

AR01 World Bank / FAO AQUASTAT: industria

AR05 WITS / UN Comtrade 842121 2024

AR08 Vital Water 300l/h

AR30 Neuquén:22proyectos21oct2026