MI LATAM Insights

Industrial water in Brazil

Open summary

Information cut-off: 22 October 2026. Historical data, company cases and scenarios have different dates and populations.

Editorial normalization and PT-BR addition: 30 October 2026. The information cut-off is unchanged.

What this supports

Assess which bill can actually be avoided, which water volume is useful, and which contractual model fits each solution. Coverage spans eight families and forty subsegments; it does not estimate a complete national private industrial TAM.

Four verifiable findings

1. CEAA manufacturing and construction expenditure was BRL3,743 million in 2020. It includes distributed water and sewerage; it is not the 2026 private industrial market. [BR23]

2. PIA 2023 records BRL535.112 million for industrial/domestic water equipment and BRL806.446 million for industrial/sanitary effluent equipment. Categories mix end uses. The 2024 figures are BRL418.427 million and BRL888.254 million, but a series break prevents a 2023–2024 growth comparison. [BR49, BR50, BR62, BR63]

3. In the Sanepar scenario, reducing purchases from 1,000 to 800 m³/month avoids BRL2,488 in water charges. With an assumed BRL3,600 alternative cost, the balance is −BRL1,112. Only if Curitiba sewer charges also disappear does the balance become +BRL1,002.80. [BR52]

4. COMUSA effective 1 September 2026: BRL17.65/m³ plus BRL363.20 per trip. An assumed 20m³, one-trip scenario costs BRL716.20, or BRL35.81/m³. This does not establish truck capacity or service availability. [BR65]

Sources and reading scope

Original titles and metadata are retained. References cited in the body that previously appeared only in the attached catalogue are also shown. The editorial revision does not establish a new source review.

BR23 | IBGE | CEAA 2018-2020, tablas híbridas de usos
https://geoftp.ibge.gov.br/informacoes_ambientais/estatisticas_e_indicadores_ambientais/contas_economicas_ambientais/contas_economicas_ambientais_da_agua/2018_2020_Brasil/xls/04_TRUs_hibridas_usos_xls.zip

BR49 | IBGE | PIA-Produto2022 revisada21agosto2026
https://ftp.ibge.gov.br/Industrias_Extrativas_e_de_Transformacao/Pesquisa_Industrial_Anual/Produto/Produto2023/tabelas_xls/tabelas_PIAProd_2022_20260821.xls

BR50 | IBGE | PIA-Produto2023 revisada21agosto2026
https://ftp.ibge.gov.br/Industrias_Extrativas_e_de_Transformacao/Pesquisa_Industrial_Anual/Produto/Produto2023/tabelas_xls/tabelas_PIAProd_2023_20260821.xls

BR52 | AGEPAR / Sanepar | Resolución23/2026 y anexo
https://www.sanepar.com.br/sites/default/files/EX_2026-04-16.pdf

BR62 | IBGE | Nota técnica01/2026 PIA-Produto
https://biblioteca.ibge.gov.br/visualizacao/livros/liv102292.pdf

BR63 | IBGE SIDRA | Tabla10476, nueva serie2024
https://sidra.ibge.gov.br/pesquisa/pia-produto/tabelas/

BR65 | COMUSA | Tarifas de serviços — vigência 01/09/2026
https://www.comusa.rs.gov.br/index.php/utilidades/tarifasservicos

Edition prepared for commercial release; no sales or business outcomes are established.