MI LATAM Insights

Industrial water in Chile

Market overview and eight business families

Free-access insight

MIO-WATER-CL-001 | C1 | Cutoff:22 October 2026

The market combines supply, equipment, efficiency, treatment, consumables, engineering, operations and data. This dossier does not establish a complete national private-sector TAM: the eight families are examined individually, with quantitative references and explicit gaps. Do not add abstraction, investment, imports and sales into a single market figure.

The research uses public sources available through 22 October 2026. It distinguishes observations, original calculations, supplier statements, inferences and hypothetical scenarios. It serves existing businesses, new ventures, manufacturers, distributors and investors; it does not replace engineering, sanitary validation or an individual quotation.

What it helps explain

Magnitudes and buyers, supply and revenue models, published prices, contracts, technology, risks and sizing questions.

Three findings for better decisions

Food and chemicals account for about 58.41% of ENIA water spending. Paper has high abstraction and relatively lower purchased-water spending: selling water and improving self-supply efficiency require different denominators. These figures measure neither demand for reports nor supplier market share. [CL30]

Original extraction of the November 2024 Customs text file reviewed 384,141 rows and found 488 items under 84212100 worth USD 19.531 million CIF. Descriptions containing DESAL account for 54 items and 83.34% of monthly value. This is a non-exclusive text tag, not verified end use. The month is not annualised and does not establish the cause of annual growth. [CL42-43]

The five references are published prices for specific products, not completed sales, tenders or a representative sample. The membranes are not equivalent. VAT treatment for the Termic resin remains unconfirmed. The 250 L/h unit is out of stock and is not presented as available for purchase. [CL56,57,60-62]

Example and use

Static pumping uses rho*g*H/(3,600,000*efficiency). At 1000 m and 80%:3.40625 kWh/m³. Useful volume is Q[L/s]*0.001*86,400*365*utilisation. At 1000 L/s and 60%:18,921,600 m³/year. Friction, transients and RO are additional. The 27 attached scenarios are illustrations, not quotations or forecasts.

Limits, method and further reading

The central quantitative limit remains: no reconciled private industrial total is established for the eight families. Mining flows, manufacturing spending, sanitation revenue, company cases, offers and imports help explain mechanisms and prioritise questions. Keeping these pieces distinct is more useful than a precise but false TAM.

Method:public primary sources, unit reconciliation and microdata extraction. No surveys, interviews, contacts or data purchases.

The full report develops 40 subsegments,five product offers,company cases and tools. This insight does not include the complete comparison and calculation system.

Sources and access status

CL30 | INE | Cuadros ENIA 2024

Relevant sections reviewed; scope limits apply

https://www.ine.gob.cl/docs/default-source/estructura-de-la-industria/cuadros-estadisticos/encuesta-nacional-industrial-anual/cuadros-estadísticos-enia-2024.xlsx?sfvrsn=8d16f846_6

CL42 | Servicio Nacional de Aduanas / datos.gob.cl | DIN noviembre2024

Relevant sections reviewed; scope limits apply

https://datos.gob.cl/dataset/registro-de-importacion-2024

CL43 | Servicio Nacional de Aduanas | Descripción y estructura DIN

Relevant sections reviewed; scope limits apply

https://datos.gob.cl/dataset/096c3946-657e-420f-ae74-2337c00b5ba2/resource/e3d83cab-3088-4daa-8555-efacf904ce6b/download/descripcion-y-estructura-de-datos-.xlsx

CL56 | Ecopura | Resina catiónica25litros

Relevant sections reviewed; scope limits apply

https://ecopurachile.cl/producto/resina-cationica-25-litros/

CL57 | Termic/Termo Eléctrico | Resina25litros

Relevant sections reviewed; scope limits apply

https://www.termoelectrico.cl/pagina-del-producto/saco-de-25l-de-resina-de-intercambio-i%C3%B3nico-para-ablandadores-de-agua

CL60 | GC Tecnologías | MembranaLP21-4040

Relevant sections reviewed; scope limits apply

https://www.gctecnologias.cl/producto/membrana-lp21-4040/

CL61 | GC Tecnologías | MembranaPMBW-400LF8pulgadas

Relevant sections reviewed; scope limits apply

https://www.gctecnologias.cl/producto/membrana-pmbw-400lf/

CL62 | GC Tecnologías | Ósmosis250litros/hora

Relevant sections reviewed; scope limits apply

https://www.gctecnologias.cl/producto/osmosis-inversa-250litros-hr/