MI LATAM Insights

Industrial water in Colombia

Eight business families

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Free-access insight

Colombia combines supply, conditioning, efficiency, treatment, consumables, engineering, operations and measurement. We examine eight families and 40 subsegments. No complete private-sector TAM is established: manufacturing statistics here do not separate private ownership, external purchases and self-operation. [CO01-05]

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

What it helps explain

Magnitudes, demand, competition, revenue models and conditions for evaluating industrial water solutions.

Executive overview

Colombia combines supply, conditioning, efficiency, treatment, consumables, engineering, operations and measurement. We examine eight families and 40 subsegments. No complete private-sector TAM is established: manufacturing statistics here do not separate private ownership, external purchases and self-operation. [CO01-05]

EAI 2024 estimates 281.252 million m³ used. Wastewater management records COP 200,770.220 million investment and COP 497,837.357 million expenditure. These magnitudes must not be added as supplier revenue. Falling investment and rising recurring expenditure support examining refurbishment and operations, without establishing profitability. [CO03]

Magnitude	2024	Unidad / Unit
Agua utilizada / Water used	281.252	millones / million m³
Inversión residual / Wastewater investment	200,770.22	millones / million COP
Gasto residual / Wastewater expenditure	497,837.357	millones / million COP

Source: CO03, tables 1 and 12. Expenditure and investment are not external sales; volume is not market value.

Three distinctions that change the analysis

Timing, investment and transformation

For 2024/2023, the comparable panel is preferred: 3,653 establishments, 94.5% of the sample. Water falls 2.33%, versus 2.95% between published totals. There is no contradiction to delete: bases differ. Wastewater investment falls 24.16% and expenditure rises 9.89%, in current currency. [CO03,04]

Published prices and comparability

The four references were observed on 22 October 2026. Only P1 states VAT included; P2-P4 do not specify it. The housing excludes a membrane and the bundle is not a complete plant. Different offers are not averaged into a market price. [CO14-17]

Technology, regulation and verification

Resolution 1256 distinguishes generator recirculation within its activity from reuse by a receiver for another use. An application is not final authorisation or delivered water. Salitre was located only in search and supports no operating volume. Technical selection requires characterisation: filtration, biological treatment, membranes and oxidation are not universal substitutes. [CO18,19,31-33]

Example, use and limitations

Hypothetical example: 100,000 m³/year, 70% recovery, 90% availability, COP 4,000/1,500 per m³ avoidable/variable costs, COP 50 million/year fixed costs and COP 300 million investment. Over five years at 12%, NPV is COP 87.513 million and break-even avoidable cost is COP 3,614.650/m³. This is not observed profitability. Nine scenarios exclude taxes, debt, terminal value and inflation. Consumables included in O&M must not be added again.

Counterevidence includes self-operation, bundled consumables, incumbents and switching costs. Risks include variable feed, energy, fouling, sludge, concentrates and interoperability. Sources establish supply variety and quantified needs, not complete private TAM, national shares, comparable margins or available contracts.

Public documentary research, without contacts, surveys, interviews, spending or external tests. Cutoff: 22 October 2026. The registry distinguishes 33 documents with relevant sections reviewed, two commercial summaries and two located without complete access. Multiple pages from one company are not independent corroborations. Historical data do not become current through the editorial date.

The full report expands eight families and 40 subsegments and includes tables, locators and a tool. Includes an ES/EN individual licence.

Fuentes clave / Key sources: CO03 DANE EAI 2024; CO25 IDEAM; CO14-17 fichas / product listings; CO32 CRA.

CO03 DANE EAI 2024 anexos

CO25 IDEAM listado acreditaciones

CO14 Fyndecol PKRO4040ULP

CO15 MercadeoValle carcasa4040

CO16 MercadeoValle conjunto4040

CO17 MercadeoValle membranaHidrotek

CO32 CRA texto1256