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Industrial water LATAM

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Six markets and a regional synthesis

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Free-access summary

México / Brasil / Chile / Colombia / Argentina / Perú

Eight families, 40 subsegments and conditions for comparing supply, treatment, reuse, equipment and services.

LATAM6 coverage. Not all Latin America and no complete private TAM. Original editions and dates retained.

Executive overview

The six countries combine supply, treatment, efficiency, equipment, consumables, engineering, operations and analytics. Business value depends on coordinating quality, continuity, cost and responsibilities. Eight overlapping families organise the value chain, rather than eight independent markets to add.

A comparable base can be reconstructed: gross H0 842121 imports of USD 820.527 million in 2024 versus USD 634.055 million in 2023. Mexico and Chile represent 73.65% of value across the six destinations. These are mixed-use goods, not final private industrial sales. [R-T-MX to R-T-PE]

Aggregate growth of 29.41% exceeds the simple mean of national changes, 18.52%. Chile accounts for 60.03% of the increase; excluding Chile reduces remaining aggregate growth to 15.67%. Commercial expansion requires investigating product mix and projects rather than extrapolating Chile’s jump across LATAM.

No complete private regional monetary TAM is established. National figures combine external purchases, imputed self-supply, investment and environmental expenditure. This synthesis preserves boundaries, identifies family-level gaps and adds a tool testing contract conditions that can reverse a decision.

Common trade comparison

País / Country	2024 USD m	2024/23 %
MX	333.967	16.03
BR	121.100	41.77
CL	270.351	70.66
CO	32.464	-8.48
AR	24.214	2.30
PE	38.432	-11.15

Base: WITS H0 842121, gross imports, mixed uses. Sum is USD 820.527 million, not TAM. Chile contributes 60.03% of the increase. Missing countries are not estimated.

A condition that reverses the choice

Service at USD 2/m³ with 1,000 fixed charge and an 8,000 m³ annual minimum costs 17,000 per year despite only 6,300 useful m³. Without the minimum it costs 13,600. The preference reverses: ownership costs less with the minimum; service costs less without it. The break-even service price changes from 1.8415 to 2.3385 USD/m³.

Fictional model scenario, not a commercial tariff. The full report develops taxonomy, atlas, six profiles, references and reproducible data. This summary retains key limits without providing the entire scenario system.

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