MI LATAM Insights

# Industrial water in Peru

## Eight business families

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Free-access insight

Peru combines large mining/energy water projects with local plant, spare-part, chemical and service supply. Eight families and 40 subsegments form an economic map, not 40 separately quantified markets.

## Understand the market and compare scope

Magnitudes, contracts, supply, risks, 40 subsegments and reproducible scenarios. No complete private TAM, market shares or guaranteed returns.

# Executive overview

Peru combines large mining/energy water projects with local plant, spare-part, chemical and service supply. Eight families and 40 subsegments form an economic map, not 40 separately quantified markets.

HS 842121 water-filtration imports were USD 38.43 million in 2024 versus USD 43.25 million in 2023. Value fell while item counts rose. These are mixed-use supply signals, not private industrial sales. [PE03-05]

The Cerro Verde-SEDAPAR agreement and Yanacocha commissioning contract document demand mechanisms, not national market size. Per-m³ billing and rentals are also offered subject to assessment. This report separates capacity, commitments and actual production. [PE06,08,11-12]

# Three distinctions that change decisions

## Physical scale and revenue

World Bank/FAO AQUASTAT reports 2022 total withdrawals of 25.919 billion $m^3$ and a 6.427717119% industrial share. Multiplication yields approximately 1.666 billion $m^3$. This is a physical calculation, not monetary TAM. Repeated values across years mean an October 2026 API refresh is not a new measurement. [PE01-02]

## Permit and outcome

The Motupe decision approves an ITS for piping/reuse modification, but Article 3 grants no other permits. Its annex separates a prior reuse authorisation from the proposed increase. This demonstrates a specific documentary dependency, not nationwide legal advice. [PE23]

The full edition retains source-level limits and an eight-family matrix. Individual ES/EN licence from VXOG SpA.

# Economics and method

Entirely hypothetical constant-PEN example: 10000 m³/year feed, 70% recovery, 90% availability, PEN25/m³ avoidable cost, PEN8/m³ variable, PEN30000 annual fixed cost, PEN200000 investment and five years at 12% real. It yields 6300 usable m³, PEN77100 annual cash flow and approximately PEN77928 NPV. Avoidable-cost breakeven is PEN21.57/m³.

Public documentary research cutoff: 22 October 2026. No interviews, surveys, contacts or purchases. Directed cases do not represent the universe. Communicated facts, own calculations, inferences and scenarios are distinguished. A refreshed page does not update its data period.

The standard-library Python tool transmits no data. It excludes taxes, debt, terminal value and technical design. Nominal series are not inflation-adjusted; no current exchange-rate conversion is made. Representative prices, sales, margins and willingness to pay for the report remain unestablished.

PE01 World Bank / FAO AQUASTAT: industria

PE05 WITS / UN Comtrade 842121 2024

PE08 ACCIONA: Yanacocha

PE23 PRODUCE: Motupe RD 0286-2025