



# Environment & Water Technologies



The Environment & Water Technologies Sector covers technologies, products, equipment and devices. Recent trends underline the principles of Circular Economy, such as sustainable product design, extending the product lifecycle, reusability, and recycling.

Relevant sub-sectors include:

- Waste water treatment
- Air pollution control
- Waste management
- Recycling
- Soil prevention
- Noise protection
- Biogas
- Biomass
- Fresh water supply and
- Water solutions

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## ***EU Focus***

Europe has a very strong position in the Environment & Water Technologies sector on the global

market. European green industries are booming, and the environment industry has been one of the few economic sectors to have grown significantly since the 2008 financial crisis.

More than 3 million people already work for eco-industries in the European Union, and European businesses supply a third of the global market for green technologies — a market estimated to be worth around € 1 trillion in 2010 and expected to double by 2020. Therefore, the Environment & Water Technologies sector has great potential as a **driver of jobs and growth** in the European Union.

### **Waste Water Treatment, Fresh Water Supply, and Water Solutions**

In 2010, the total turnover of the European Water and Waste Water Treatment industry was estimated to be around € 95 billion.

Crucially, the top five players in the global market were European companies. It is calculated that these multinationals, dominated by French and German utilities, accounted for 32% of the global market in 2010.

### **Soil Prevention**

The key market drivers for Soil Prevention are EU directives. The sub-sector is estimated to be worth between € 2 and € 10 billion in 2011. The industry is characterised by a small number of large firms and the UK has emerged as one of the EU's largest markets, one of the most progressive sectors with a high level of innovation, coupled with strong support for R&D, many leading global industry players and large scale site demonstration of new technologies.

### **Waste Management and Recycling**

The European Commission calculates that the total European Waste Management and Recycling market was over € 95 billion in 2009. Furthermore, Eurostat data reveals that, from 2001 to 2006, the European recycling industry alone has more than doubled, growing from € 19 billion to € 42.4 billion. Although the largest markets are, respectively, in France, UK, Germany and Italy, new member states have the greatest opportunities for growth.

#### **Air Pollution Control and Noise Protection**

EU directives are the major legislative driver for Air Pollution Control and Noise Protection, alongside national legislation that may have stricter limits. The total value of the European market is estimated at around € 16 billion in 2011. German companies maintain a dominant position both in the production and the external EU trade of most technology products related to the control of air pollution.

### **Biogas**

Rapidly increasing prices for conventional fossil-fuel based power generation, coupled with a need to reduce environmental and climate impacts from their usage are two major drivers behind technological investment in the Biogas sub-sector. There is no doubt that the role of biogas in the European energy mix is steadily growing. All EU countries have a biogas sector, but just ten countries provide 85% of the total biogas production in Europe.



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