

Polyacrylamides Market By Product Type (Non-ionic Polyacrylamide (NPAM), Anionic Polyacrylamide (APAM), Cationic Polyacrylamide (CPAM), Amphoteric Polyacrylamide, High Molecular Weight Polyacrylamide, Cross-linked Polyacrylamide), By Form (Powder/granular, Emulsion, Liquid), By Application (Water treatment, Enhanced oil recovery (EOR), Papermaking, Mining and Mineral Processing, Personal Care, Food Processing, Others): Global Opportunity Analysis and Industry Forecast, 2023-2032

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Abstracts

The global polyacrylamide market was valued at \$5.0 billion in 2022 and is estimated to reach \$8.4 billion by 2032, exhibiting a CAGR of 5.5% from 2023 to 2032.

Polyacrylamide is a synthetic polymer made from acrylamide monomers. It is a type of water-soluble polymer with a linear structure, composed of repeating units of acrylamide. Polyacrylamide is known for its high-water solubility and is used in various industrial and environmental applications. Depending on the specific chemical groups attached to the polymer chain, polyacrylamides can be classified into nonionic, anionic, or cationic types. They are commonly employed as flocculants, aiding in the aggregation, and settling of particles in water, making them useful in water treatment, enhanced oil recovery, soil erosion control, and other processes.

One of the primary drivers of the polyacrylamides market is the increasing demand for water treatment solutions. With the global population on the rise and industrial activities

expanding, there is a growing need for effective water management and purification. Polyacrylamides are used in water treatment processes for flocculation and sedimentation, helping to remove suspended particles and contaminants. The escalating concerns about water scarcity and the emphasis on sustainable water usage are propelling the adoption of polyacrylamides in water treatment applications.

Furthermore, in agriculture, polyacrylamides play a crucial role in soil conditioning and erosion control. They are utilized to improve soil structure, water retention, and nutrient delivery in agricultural fields. As the global population continues to grow, there is an increasing pressure to enhance agricultural productivity, and polyacrylamides contribute to achieving this by optimizing soil conditions and water management. Additionally, the awareness of sustainable farming practices has led to the adoption of polyacrylamides as part of environment-friendly agricultural solutions.

However, the polyacrylamides market is highly dependent on raw materials derived from petrochemical sources, particularly acrylonitrile and acrylic acid. Fluctuations in oil prices directly impact the production costs of polyacrylamides, leading to increased price volatility. Manufacturers face challenges in stabilizing their profit margins, and end-users may explore alternative solutions to avoid cost uncertainties. This volatility can deter market growth and hinder investment in the polyacrylamides sector.

On the contrary, in the oil and gas industry, polyacrylamides serve diverse purposes, such as enhanced oil recovery (EOR) and drilling muds. As the quest for oil and gas reserves becomes more challenging, the demand for technologies that maximize extraction efficiency grows. Polyacrylamides enhance the viscosity of water, facilitating better displacement of oil from reservoirs. Moreover, these polymers aid in controlling the rheological properties of drilling muds, contributing to the overall efficiency and success of drilling operations. With the continual exploration of unconventional oil and gas resources, the polyacrylamides market is poised for expansion.

The polyacrylamide market is segmented on the basis of product type, form, application, and region. On the basis of product type, the market is categorized into Non-ionic Polyacrylamide (NPAM), Anionic Polyacrylamide (APAM), Cationic Polyacrylamide (CPAM), Amphoteric Polyacrylamide, High Molecular Weight Polyacrylamide, and Cross-linked Polyacrylamide. By form, the market is classified into powder/granular, emulsion, and liquid. On the basis of application, it is divided into water treatment, enhanced oil recovery (EOR), papermaking, mining and mineral processing, personal care, food processing, and others. Region-wise, the market is studied across North

America, Europe, Asia-Pacific, and LAMEA.

Global Polyacrylamide market, by Type

In 2022, the anionic polyacrylamide (APM) segment was the largest revenue generator and is anticipated to grow at a CAGR of 5.9% during the forecast period. In municipal water treatment plants, APAM is used to enhance the settling of solids and improve the efficiency of sedimentation and filtration processes. This is particularly important in densely populated areas where the demand for clean water is high. Additionally, APAM finds applications in industrial wastewater treatment, helping industries comply with environmental regulations and minimize the environmental impact of their operations.

Global Polyacrylamide market, by form

By form, the liquid segment dominated the global market in 2022, and is anticipated to grow at a CAGR of 5.4% during forecast period. One of the primary drivers for the increased demand for liquid polyacrylamide is its crucial role in water treatment processes. As the global population continues to grow, there is an escalating demand for clean and potable water. Liquid polyacrylamide is widely used as a flocculant in water treatment plants to facilitate the removal of suspended solids, organic matter, and other impurities. Its high molecular weight and ability to form large, dense flocs make it highly effective in the clarification and purification of water. With the intensification of industrial activities and urbanization, the need for advanced water treatment solutions has become more pronounced, contributing significantly to the rising demand for liquid polyacrylamide.

Global Polyacrylamide market, by application

By application, the water treatment segment dominated the global market in 2022 and is anticipated to grow at a CAGR of 5.7% during the forecast period. Polyacrylamide is particularly valuable in water treatment due to its versatility and effectiveness in various applications. One of its key functions is as a flocculant, aiding in the aggregation and settling of suspended particles in water. This process is crucial for the removal of impurities, sediments, and other contaminants from wastewater, making it suitable for recycling or safe discharge into the environment.

Polyacrylamide market, by region

The Asia-Pacific polyacrylamide market size is projected to grow at the highest CAGR of 5.8% during the forecast period and accounted for 39.8% of polyacrylamide market share in 2022. Polyacrylamide is extensively used in water treatment processes, including wastewater treatment and purification of drinking water. With growing industrialization and urbanization in the Asia-Pacific region, the demand for effective water treatment solutions has been on the rise. Furthermore, the oil and gas industry utilizes polyacrylamide for enhanced oil recovery methods. As the demand for energy continues to increase in the Asia-Pacific region, the use of polyacrylamide in EOR processes may also grow.

The global polyacrylamide market profiles leading players that include Ashland, BASF SE, SNF Group, China National Petroleum Corporation, Dow, Kemira, Solvay, Solenis, Mitsui Chemicals, Black Rose Industries Ltd., and ZL Group.

Other key players involved in the manufacturing of polyacrylamide includes Anhui Jucheng Fine Chemical Co, Ltd., Shandong Polymer Bio-Chemicals Co., Ltd., Xita Polymer Co., Ltd., Dongying Kechuang Biochemical Industrial Co., Ltd., and Dongying Kechuang Biochemical Industrial Co., Ltd.

The global polyacrylamide market report provides in-depth competitive analysis as well as profiles of these major players.

Report Key Highlighters

The report provides competitive dynamics by evaluating business segments, product portfolios, target market revenue, geographical presence and key strategic developments by prominent manufacturers.

The global polyacrylamide market is fragmented in nature among prominent companies such as Ashland, BASF SE, SNF Group, China National Petroleum Corporation, Dow, Kemira, Solvay, Solenis, Mitsui Chemicals, Black Rose Industries Ltd., and ZL Group.

The study contains qualitative information such as the market dynamics (drivers, restraints, challenges, and opportunities), key regulation analysis, pricing analysis, and Porter's five force analysis across North America, Europe, Asia-Pacific, LAMEA regions.

Latest trends in global polyacrylamide market such as undergoing R&D activities, regulatory guidelines, and government initiatives are analyzed across 16 countries in 4

different regions.

More than 3,200 polyacrylamide-related product literatures, industry releases, annual reports, and other such documents of key industry participants along with authentic industry journals and government websites have been reviewed for generating high-value industry insights for the global polyacrylamide market.

Key benefits for stakeholders

Porter's five forces analysis helps analyze the potential of buyers & suppliers and the competitive scenario of the industry for strategy building.

It outlines the current cyclodextrin market trends and future estimations from 2022 to 2032 to understand the prevailing opportunities and potential investment pockets.

The major countries in the region have been mapped according to their individual revenue contribution to the regional market.

The key drivers, restraints, and opportunities and their detailed impact analysis are explained in the study.

The profiles of key players and their key strategic developments are enlisted in the report.

IMPACT OF COVID-19 ON THE GLOBAL POLYACRYLAMIDE MARKET

COVID-19 has disrupted global supply chains across various industries. Restrictions on transportation, lockdowns, and workforce shortages have impacted the production and distribution of polyacrylamides.

Furthermore, industries such as water treatment, petroleum, and paper production are significant consumers of polyacrylamides. The pandemic has led to changes in demand patterns, with some sectors experiencing a decline in demand due to economic slowdowns, while others may have seen increased demand, such as for water treatment facilities.

The pandemic led to delays in various construction projects and industrial activities. Polyacrylamides are used in processes like soil conditioning and erosion control, and

delays in construction projects have affected the demand for these applications.

However, companies have worked to stabilize their supply chains by addressing any lingering disruptions caused by the pandemic. This involves optimizing production processes, securing reliable sources for raw materials, and ensuring efficient distribution.

Additionally, industries have adapted to changes in demand patterns post-COVID-19. Some applications of polyacrylamides, such as water treatment, have experienced sustained or increased demand due to a renewed focus on infrastructure projects or environmental concerns.

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