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Saudi Arabia Water and Wastewater Treatment Chemicals Market Analysis: Focus on Product and Application - Analysis and Forecast, 2024-2034

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Abstracts

This report will be delivered in 7-10 working days.Saudi Arabia Water and Wastewater Treatment Chemicals Market Overview

The Saudi Arabia water and wastewater treatment chemicals market was valued at $1.14 billion in 2023 and is expected to grow at a CAGR of 8.50% and reach $2.80 billion by 2034. The demand for water and wastewater treatment chemicals in Saudi Arabia has been growing rapidly, driven by the country’s increasing focus on sustainable water management and the need to address water scarcity. These chemicals play a crucial role in ensuring the safe treatment and reuse of water, especially in industrial and municipal sectors. Saudi Arabia's investment in large-scale desalination projects and wastewater recycling initiatives has been boosting the need for effective treatment solutions. Technological advancements in chemical formulations have enhanced their efficiency in treating various contaminants, further driving adoption. Additionally, the government's focus on environmental regulations and sustainable practices has accelerated the growth of the water and wastewater treatment chemicals market across the region.

Introduction to Water and Wastewater Treatment Chemicals Market

Water and wastewater treatment chemicals are specialized substances used in the purification, treatment, and management of water resources across industrial, municipal, and residential sectors. These chemicals serve essential functions such as

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coagulation, disinfection, pH adjustment, and removal of impurities such as heavy metals and organic contaminants. In Saudi Arabia, these chemicals play a critical role in ensuring the safe treatment and reuse of water, particularly in desalination plants and wastewater recycling facilities. Integrated with advanced treatment technologies, such as membrane filtration and biological processes, these chemicals optimize water quality and support the country's efforts toward sustainable water management. By enhancing the efficiency of water treatment processes, they contribute to addressing water scarcity and ensuring compliance with environmental regulations.

Market Introduction

The Saudi Arabia water and wastewater treatment chemicals market has been witnessing robust expansion, driven by the country's efforts toward water scarcity and enhancing water quality in line with its sustainability goals. These chemicals, which include agents for disinfection, purification, and corrosion prevention, are vital for treating water in sectors such as industrial processing, municipal water systems, and large-scale desalination projects. As Saudi Arabia accelerates infrastructure development and implements advanced water recycling and reuse systems, the demand for efficient chemical treatments has been rising. This market growth is supported by the increasing adoption of innovative chemical technologies, stringent environmental regulations, and the country's push toward more sustainable water management practices to meet industrial and population needs.

Industrial Impact

The industrial impact of the Saudi Arabia water and wastewater treatment chemicals market extends across multiple sectors, supporting environmental sustainability and technological advancement in water management. As industries such as oil and gas, manufacturing, and agriculture seek more efficient water usage, the demand for advanced chemical treatments has risen, promoting innovation in treatment processes and product formulations. This market growth encourages collaboration between chemical manufacturers, water treatment providers, and regulatory bodies to meet stringent environmental standards. Furthermore, it creates job opportunities in chemical engineering, environmental consultancy, and water management, contributing to the region’s industrial ecosystem. This market plays a critical role in addressing water scarcity, promoting sustainability, and supporting Saudi Arabia’s broader environmental and economic development goals by optimizing water treatment practices.

The key players operating in the Saudi Arabia water and wastewater treatment

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chemicals market include Akzo Nobel N.V., Samachem, WETICO, Veolia, Ecolab, BASF, REDA Water, Juffali, REZA Group (Reza Industrial Solution), Al Jazira Water Treatment Chemicals, Solenis, SUEZ, The Chemours Company, Dow, Univar Solutions LLC, Kurita Water Industries Ltd., AES Arabia Ltd, alwaslchem and Italmatch Chemicals S.p.A. These companies have been focusing on strategic partnerships, collaborations, and acquisitions to enhance their product offerings and expand their market presence.

Market Segmentation:

Segmentation 1: by Application

RO Chemicals

Cooling Chemicals

Boiler Chemicals

Portable Water Network Chemicals

Filtration and Dewatering Chemicals

Laundry Chemicals

RO Chemicals Application to Lead the Market (by Application)

In Saudi Arabia's water and wastewater treatment chemicals market, reverse osmosis (RO) chemicals have been leading the market by application, driven by the growing need for efficient water purification and desalination processes. RO chemicals are crucial for maintaining the performance and longevity of RO systems, which are widely used in desalination plants, industrial water treatment, and municipal water supplies across the country. These chemicals prevent scale formation, fouling, and corrosion in RO membranes, ensuring optimal filtration and water quality. With Saudi Arabia's increasing investments in large-scale desalination projects and a rising focus on sustainable water management, the demand for advanced RO chemicals is set to grow. As the country continues to prioritize water resource optimization, RO chemicals will play a pivotal role in supporting the expansion of water treatment technologies, enhancing system efficiency, and driving market growth.

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Segmentation 2: by Product

RO Antiscalants

RO Cleaning Chemicals

Scale Inhibitors (Cooling)

Corrosion and Scale Inhibitors (Cooling)

Biocides – Oxidizing and Non-Oxidizing (Cooling)

Dispersants (Cooling)

Scale Inhibitors and Dispersants

Condensate Treatment (Corrosion Inhibitor)

Scale and Corrosion Inhibitors (Potable Water Network)

Filtration Aid Chemicals (Coagulant and Flocculant)

Sludge Dewatering Polymer

Powder Detergent

Softener

Powder Bleach

RO Antiscalants to Lead the Market (by Product)

RO antiscalants are set to lead the Saudi Arabia water and wastewater treatment chemicals market by product, driven by the rising demand for effective solutions to maintain the efficiency of reverse osmosis (RO) systems. Antiscalants play a critical role in preventing scale buildup on RO membranes, which is essential for optimizing system performance, extending membrane life, and reducing maintenance costs. As desalination remains a key water source in Saudi Arabia, the demand for RO

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antiscalants has been growing across both industrial and municipal sectors. These chemicals are integral to ensuring the continuous operation of desalination plants, which are vital for addressing the country's water scarcity challenges. With increasing investments in water infrastructure and a focus on sustainable water management, RO antiscalants are expected to be a major contributor to market growth, supporting the efficiency and longevity of water treatment systems.

Recent Developments in the Saudi Arabia Water and Wastewater Treatment Chemicals Market

In February 2024, VA TECH WABAG, an Indian multinational specializing in water technology, secured a $33.5 million contract from SEPCO III Electric Power Construction Corporation to provide engineering and procurement services for a 20 MLD Industrial Wastewater Treatment Plant at the Ras Tanura Refinery Complex in Saudi Arabia. The project, scheduled for completion in 20 months, employs advanced treatment technologies, including biological treatment, filtration, and reverse osmosis.

In February 2024, Saudi-listed Nama Chemicals Company announced that it would begin work on a $19.0 million wastewater treatment project for its calcium chloride and epoxy resin plant. The project, which started in March 2024, treated wastewater from Nama's Jubail Chemicals subsidiary, and trial production ran for two months after completion.

In February 2024, Saudi Arabia’s National Water Company (NWC) launched a series of water and sanitation projects valued at approximately $959.0 million across Riyadh, Madinah, and the Eastern Province. These initiatives, which include over 2,900 kilometers of water and sanitation networks, have been aimed at improving infrastructure in the water and environmental sectors, enhancing service coverage, and boosting customer satisfaction.

In January 2022, Saudi Arabia completed the Shuqaiq 3 desalination plant, one of the country's largest, with a capacity of 450,000 cubic meters of water produced through energy-efficient reverse osmosis technology.

In December 2021, Veolia secured a seven-year management contract to oversee water and wastewater services for the Riyadh region, serving nearly 9 million residents, with revenues of approximately $92.2 million. The agreement, awarded by the National Water Company, covers a vast network of 30,000 km

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for drinking water and 10,000 km for wastewater. This project aims to reduce water distribution losses by half, guarantee 24/7 access to quality drinking water, and implement a training program for over 5,000 local employees.

Demand - Drivers, Limitations, and Opportunities

Market Drivers: High Population Growth and Urbanization of Saudi Arabia

High population growth and rapid urbanization in Saudi Arabia are significant drivers of the water and wastewater treatment chemicals market. As the population continues to grow, especially in urban centers, the demand for clean water and efficient wastewater management has surged. Urbanization brings increased residential, commercial, and industrial activity, placing immense pressure on the country's limited water resources. This has led to a greater need for effective water treatment solutions, including chemicals, to ensure the safety and sustainability of water supply and wastewater disposal systems.

For instance, in January 2022, Saudi Arabia completed the Shuqaiq 3 desalination plant, one of the country's largest, with a capacity of 450,000 cubic meters of water produced through energy-efficient reverse osmosis technology. Built by a consortium comprising Almar Water Solutions, ACCIONA, Marubeni Corporation, and Rawafid Alhadarah Holding Co., the facility provides high-quality drinking water to over 1.8 million residents in the Asir and Jizan provinces. The project supports Saudi Arabia's Vision 2030 by enhancing water security and promoting sustainability, thereby contributing to the modernization of the nation's water sector and addressing regional water scarcity challenges.

Market Challenges: High Capital and Operational Costs Associated with Building and Maintaining Treatment Plants

High capital and operational costs associated with building and maintaining water and wastewater treatment plants present a significant restraint in the Saudi Arabia water and wastewater treatment chemicals market. The initial investment required for constructing large-scale treatment facilities is substantial, involving the procurement of advanced equipment, technology, and infrastructure. Additionally, ongoing operational expenses, such as energy consumption, chemical supplies, skilled labor, and maintenance, add to the financial burden. These high costs can limit the development of new treatment facilities, particularly in regions with smaller budgets or lower economic activity, slowing

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down the adoption of modern treatment solutions.

Additionally, many older wastewater treatment plants, such as those in Riyadh and Dammam, require frequent upgrades and maintenance to comply with updated environmental standards. These upgrades come at a high cost, often forcing municipalities and private operators to allocate significant portions of their budgets to plant upkeep, which in turn limits their ability to invest in critical areas of water infrastructure.

Market Opportunities: Public-Private Partnerships (PPPs)

Public-Private Partnerships (PPPs) present a significant opportunity in Saudi Arabia water and wastewater treatment chemicals market by enabling the government to utilize private sector expertise, technology, and investment to address water infrastructure needs. With rising water demand and the ambitious goals set under Vision 2030, PPPs offer a solution to share the financial burden of developing new treatment plants and upgrading existing ones. Through collaboration, the public sector can tap into private sector efficiency and innovation, helping to overcome resource limitations while ensuring that essential water services continue to meet the needs of a growing population and industrial sector.

One of the instances of a successful PPP in Saudi Arabia is the Jeddah Airport Wastewater Treatment Plant project. This project was developed under a PPP agreement between Saudi Water Partnership Company (SWPC) and a consortium of international private companies, including Metito, Veolia, and Vision Invest. The partnership allowed for the construction of a state-of-the-art facility that serves the airport and surrounding areas, demonstrating how private sector involvement can enhance the capacity and technological sophistication of water treatment infrastructure. Another example is the Shuaibah Desalination Project, which operates under a PPP model and is considered one of the largest desalination plants globally, producing millions of cubic meters of potable water daily.

The ongoing success of PPPs in the water sector suggests that Saudi Arabia should continue to utilize this model to meet future water and wastewater treatment needs. Companies entering the market should focus on building strong, transparent relationships with government entities and other regulatory bodies to capitalize on this opportunity fully. Additionally, private companies must demonstrate their ability to deliver advanced, sustainable water treatment solutions that align with Saudi Arabia's long-term goals for energy efficiency and environmental stewardship. As demand for

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water treatment chemicals grows, the role of PPPs will likely expand, providing both local and international players with opportunities for growth and partnership.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different applications of water and wastewater treatment chemicals based on application (RO chemicals, cooling chemicals, boiler chemicals, portable water network chemicals, filtration and dewatering chemicals, laundry chemicals) and by product (touch screen and non-touchscreen). The market is poised for significant expansion with ongoing technological advancements, increased investments, and growing awareness of water scarcity. Therefore, the Saudi Arabia water and wastewater treatment chemicals market business is a high-investment and high-revenue generating model.

Growth/Marketing Strategy: The Saudi Arabia water and wastewater treatment chemicals market has been growing at a rapid pace. The market offers enormous opportunities for existing and emerging market players. Some of the strategies covered in this segment are mergers and acquisitions, product launches, partnerships and collaborations, business expansions, and investments. The strategies preferred by companies to maintain and strengthen their market position primarily include product development.

Competitive Strategy: The key players in the Saudi Arabia water and wastewater treatment chemicals market analyzed and profiled in the study include professionals with expertise in the water and wastewater treatment domains. Additionally, a comprehensive competitive landscape such as partnerships, agreements, and collaborations are expected to aid the reader in understanding the untapped revenue pockets in the market.

Research Methodology

Factors for Data Prediction and Modelling

> The base currency considered for the market analysis is US$. Currencies other than the US$ have been converted to the US$ for all statistical calculations, considering the average conversion rate for that particular year.
>
> The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

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Nearly all the recent developments from January 2021 to October 2024 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major technological breakthroughs.

Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the Saudi Arabia water and wastewater treatment chemicals market.

The market engineering process involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes is explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

Primary Research

The primary sources involve industry experts from the Saudi Arabia water and wastewater treatment chemicals market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

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The key data points taken from primary sources include:

- Validation and triangulation of all the numbers and graphs
- Validation of reports segmentation and key qualitative findings
- Understanding the competitive landscape
- Validation of the numbers of various markets for market type
- Percentage split of individual markets for analysis

Secondary Research

This research study of the Saudi Arabia water and wastewater treatment chemicals market involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the market. In addition to the aforementioned data sources, the study has been undertaken with the help of other data sources and websites, such as IRENA and IEA.

Secondary research was done to obtain crucial information about the industry’s value chain, revenue models, the market’s monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

- Segmentations and percentage shares
- Data for market value
- Key industry trends of the top players of the market
- Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

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Quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies profiled in the Saudi Arabia water and wastewater treatment chemicals market have been selected based on inputs gathered from primary experts, who have analyzed company coverage, product portfolio, and market penetration.

Some of the prominent names in this market are:

Akzo Nobel N.V.

Samachem

WETICO

Veolia

Ecolab

BASF

REDA Water

Juffali

Reza Industrial Solution (REZA Investment Company Ltd.)

Al-Jazira Water Treatment Chemicals

Solenis

SUEZ

The Chemours Company

Dow

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Univar Solutions LLC

Kurita Water Industries Ltd.

AES Arabia Ltd.

alwaslchem

Italmatch Chemicals S.p.A

Companies that are not a part of the aforementioned pool have been well represented across different sections of the report (wherever applicable).

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List Of Tables

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List Of Figures

LIST OF FIGURES

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