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Global Green Chelates/Natural Chelating Agents Market Size Study & Forecast, by Type, Application, and Regional Forecasts 2025–2035

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Abstracts

The Global Green Chelates/Natural Chelating Agents Market is valued at approximately USD 2.61 billion in 2024 and is anticipated to grow at a compelling CAGR of 5.10% during the forecast period of 2025–2035. Green chelates, also known as natural chelating agents, have emerged as essential additives across a broad spectrum of applications including household cleaning, personal care, water treatment, and industrial processes. Their ability to bind with metal ions in an environmentally friendly manner sets them apart from traditional petrochemical-based chelators, which are often non-biodegradable and potentially toxic. As global industries continue to pivot toward greener, sustainable formulations, the adoption of bio-based and biodegradable chelating agents is becoming not just an alternative, but a necessity.

As regulatory pressure mounts across regions—driven by frameworks like REACH in Europe and EPA guidelines in North America—manufacturers are transitioning toward more sustainable formulations. Green chelating agents such as GLDA (L-glutamic acid N,N-diacetic acid), MGDA (Methylglycinediacetic acid), and EDDS (Ethylenediamine-N,N'-disuccinic acid) have gained significant traction due to their excellent biodegradability and compatibility with eco-label requirements. Furthermore, demand for sodium gluconate in industrial cleaning and construction has seen a steady uptick, thanks to its non-toxic nature and superior performance in hard water conditions. In particular, the surge in demand for phosphate-free detergents and natural skincare formulations has opened up profitable avenues for market participants.

Regionally, North America commanded a prominent share of the global green chelates market in 2024, buoyed by early adoption of sustainable chemistry and strict environmental compliance. The United States, backed by robust industrial cleaning and

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water treatment sectors, anchors regional dominance with high product demand from institutional and municipal facilities. In contrast, Europe remains a front-runner in regulatory leadership, propelling widespread use of biodegradable chelating agents, particularly in countries like Germany, France, and the Netherlands. Meanwhile, Asia Pacific is anticipated to register the fastest growth rate during the forecast period. This rise is driven by rapid industrialization, growing consumer awareness, and proactive government initiatives in China, India, and Southeast Asian nations. The cost-effectiveness of production in these regions, combined with rising demand for green-labeled products, is setting the stage for sustained growth.

Major market player included in this report are:

BASF SE

Croda International Plc.

AkzoNobel N.V.

Innospec Inc.

The Dow Chemical Company

Nouryon

Nippon Shokubai Co., Ltd.

Mitsubishi Chemical Group Corporation

Jungbunzlauer Suisse AG

Kemira Oyj

Lanxess AG

Seppic (Air Liquide)

PQ Group Holdings Inc.

Merck KGaA

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SACHEM Inc.

Global Green Chelates/Natural Chelating Agents Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Type:

Sodium Gluconate

Ethylenediamine-N, N'-disuccinic Acid (EDDS)

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L-glutamic Acid N, N-diacetic Acid (GLDA)

Methyl Glycindiacetic Acid (MGDA)

Others

By Application:

Cleaning

Personal Care

Water Treatment

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

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- Rest of Europe

Asia Pacific

- China
- India
- Japan
- Australia
- South Korea
- Rest of Asia Pacific

Latin America

- Brazil
- Mexico

Middle East & Africa

- UAE
- Saudi Arabia
- South Africa
- Rest of Middle East & Africa

Key Takeaways:

- Market Estimates & Forecast for 10 years from 2025 to 2035.

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Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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Contents

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CHAPTER 4. GLOBAL GREEN CHELATES/NATURAL CHELATING AGENTS INDUSTRY ANALYSIS

CHAPTER 5. GLOBAL GREEN CHELATES/NATURAL CHELATING AGENTS MARKET SIZE & FORECASTS BY TYPE 2025–2035

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CHAPTER 8. COMPETITIVE INTELLIGENCE

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List Of Tables

LIST OF TABLES

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List Of Figures

LIST OF FIGURES

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