

# **Global Industrial Sludge Treatment Chemicals Market Size Study & Forecast, by Sludge Type, Process Chemicals, End User and Regional Forecasts 2025-2035**

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## **Abstracts**

The Global Industrial Sludge Treatment Chemicals Market is valued at approximately USD 7.58 billion in 2024 and is projected to expand at a compound annual growth rate (CAGR) of 5.65% during the forecast period from 2025 to 2035. Industrial sludge—an inevitable byproduct of manufacturing and municipal processes—poses a considerable environmental and operational burden. The growing implementation of sludge treatment chemicals such as coagulants, flocculants, and disinfectants has become critical in reducing the sludge volume, eliminating pathogens, and converting hazardous waste into manageable forms. The mounting global pressure to comply with stringent environmental standards and adopt circular economy models is compelling industries to pivot toward sustainable waste and water management solutions, significantly fuelling the demand for advanced sludge treatment chemicals. Additionally, the surge in wastewater treatment plant construction and industrial expansion, particularly in developing economies, is pushing this market into an accelerated growth trajectory.

With industries increasingly focusing on achieving zero liquid discharge and lowering their carbon footprint, sludge treatment chemicals are seeing a broader application across diverse sectors such as food & beverages, pulp & paper, chemicals, and personal care. These chemicals not only enable efficient sludge conditioning and dewatering but also enhance the operational life of equipment by preventing corrosion and blockages. For example, flocculants and coagulants play a vital role in aggregating suspended particles and separating solids from liquids, thereby optimizing sludge handling processes. Moreover, disinfectants are gaining traction for their capability to eradicate pathogenic microorganisms before the final disposal or reuse of treated

sludge. Despite these promising developments, high treatment costs and variability in sludge composition continue to present challenges. However, with innovation in biodegradable and high-efficiency chemical formulations, companies are positioning themselves to tap into the rising demand for eco-friendly and cost-effective sludge management solutions.

Regionally, North America leads the industrial sludge treatment chemicals market, supported by a well-established wastewater treatment infrastructure, rigorous regulatory enforcement by agencies such as the EPA, and early adoption of advanced sludge management technologies. The United States remains a major contributor, driven by its extensive industrial base and increasing investments in upgrading municipal wastewater facilities. Europe follows closely, particularly led by countries like Germany, France, and the UK, where stringent environmental compliance and sustainability mandates are driving the proactive deployment of treatment chemicals. Meanwhile, the Asia Pacific region is poised for the fastest growth during the forecast period, underpinned by burgeoning industrialization, rapid urbanization, and increasing governmental support for wastewater infrastructure development in China, India, and Southeast Asia. Additionally, growing awareness regarding environmental pollution and rising health concerns are encouraging municipalities and industries alike to adopt efficient sludge treatment practices in the region.

Major market player included in this report are:

Kemira Oyj

BASF SE

Kurita Water Industries Ltd.

Ecolab Inc.

Veolia Environnement S.A.

Thermax Limited

SUEZ Water Technologies & Solutions

SNF Floerger Group

Solenis LLC

Accepta Ltd.

Aquatech International LLC

Aries Chemical, Inc.

Organo Corporation

Beckart Environmental, Inc.

Feralco AB

#### Global Industrial Sludge Treatment Chemicals 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 Sludge Type:**

Activated

Primary

Mixed

**By Process Chemicals:**

Flocculants

Coagulants

Disinfectants

**By End User:**

Food and Beverages

Pulp and Paper

Personal Care

Chemicals

Municipal Waste Water

Other End Users

**By Region:**

## North America

U.S.

Canada

## Europe

UK

Germany

France

Spain

Italy

ROE

## Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

## 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.

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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