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Global Process Chemicals for Water Treatment Market Size Study & Forecast, by Chemical Type, End-Use Industry, Treatment Process, Technology, Application, and Regional Forecasts 2025-2035

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Abstracts

Global Process Chemicals for Water Treatment Market was valued at approximately USD 16.18 billion in 2024 and is poised to grow at a CAGR of 4.38% over the forecast period from 2025 to 2035. As nations race to secure sustainable water infrastructure amid depleting freshwater sources, process chemicals have emerged as pivotal agents in improving the quality and efficiency of both water purification and wastewater treatment systems. These chemicals, ranging from coagulants and biocides to corrosion inhibitors and specialty agents, are tailored to facilitate complex reactions, eliminate impurities, inhibit scaling, and ensure operational continuity across diverse water treatment applications. Their adoption has been significantly accelerated by the rising water demands in residential, commercial, and industrial sectors, along with stricter regulatory frameworks governing water discharge and reuse.

The market is also witnessing a growing emphasis on advanced and sustainable treatment technologies that integrate eco-friendly and biodegradable chemical formulations. Rapid urbanization and the parallel rise in power generation, oil & gas exploration, and heavy industries have compelled stakeholders to adopt more efficient water recycling and reuse protocols—thus spurring demand for chemical processes that enhance throughput and reduce operational downtime. Moreover, innovations in membrane treatment, ion exchange systems, and reverse osmosis are synergistically boosting the market, as process chemicals remain indispensable for optimizing these technologies' performance. However, escalating raw material prices and the environmental impact of some traditional chemical treatments remain significant hurdles to overcome during the forecast horizon.

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Geographically, North America dominates the market due to well-developed utility infrastructure, proactive water reuse policies, and the presence of major chemical manufacturing hubs. The region’s strong foothold in power generation and oilfield services continues to stimulate consumption of process chemicals, especially in high-performance desalination and cooling tower operations. Meanwhile, the Asia Pacific region is anticipated to witness the fastest growth, driven by industrial expansion, high population density, and increasing urban water stress in countries like China, India, and Southeast Asian nations. Europe follows closely, where stricter EU environmental compliance and investments in smart water management technologies are catalyzing the demand for next-gen process chemicals across municipal and industrial wastewater treatment facilities.

Major market player included in this report are:

Ecolab Inc.

Kemira Oyj

Solenis LLC

SUEZ Water Technologies & Solutions

Dow Inc.

SNF Group

BASF SE

Veolia Water Technologies

Kurita Water Industries Ltd.

Ashland Inc.

Baker Hughes Company

Thermax Limited

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Accepta Ltd.

Buckman Laboratories

Chembond Chemicals Ltd.

Global Process Chemicals for Water Treatment 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 Chemical Type:

Coagulants and Flocculants

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- Acids and Bases
- Oxidizing and Reducing Agents
- Corrosion Inhibitors
- Biocides and Dispersants
- Specialty Chemicals

By End-Use Industry:

- Municipal
- Industrial
- Commercial
- Residential
- Power Generation

By Treatment Process:

- Coagulation and Flocculation
- Filtration
- Disinfection
- Ion Exchange
- Membrane Treatment
- Reverse Osmosis

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By Technology:

- Conventional
- Advanced
- Sustainable

By Application:

- Water Purification
- Wastewater Treatment
- Desalination
- Cooling Water Treatment
- Oil and Gas Production

By Region:

North America

- U.S.
- Canada

Europe

- UK
- Germany
- France

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- Spain
- Italy
- Rest of Europe

Asia Pacific

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

Latin America

- Brazil
- Mexico
- Rest of Latin America

Middle East & Africa

- UAE
- Saudi Arabia
- South Africa

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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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CHAPTER 10. COMPETITIVE INTELLIGENCE

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