

# Global Froth Flotation Chemicals Market Outlook to 2027

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## Abstracts

Froth flotation chemicals are the additives added to the pulp in the flotation machine to separate the selected minerals. According to BlueQuark Research & Consulting, the global Froth flotation chemicals market is expected to witness a moderate growth rate during the forecast period. The consumption of froth flotation chemicals is driven by the increasing demand from the mining sector and the increasing rate of paper recycling across the globe. However, the stringent regulations existing in Europe and the North American region are expected to hinder the market growth.

Before the paper is recycled, the printing inks have to be removed to increase whiteness and purity. Froth flotation chemicals are used for deinking the used paper and in the recycling process of the paper and pulp industry. In the European region, an increasing amount of used paper is supplied by waste management companies. This contributes to an increased availability of paper for recycling and reducing the amount of paper going into landfills. In 2019, the paper recycling rate stood at 72%, up from 71.7% in 2018. Europe has collected 56.5 million tons of recovered paper and used more than 48.5 million tons of recovered paper to produce paper in 2018. In terms of geography, Asia-Pacific and Europe are the major regions that use recycled paper for containerboard production. Currently, about 53% of the fiber raw material used for papermaking comes from recycled paper compared to 40% in the year 1991.

In the last ten years, the production of packaging paper and board, as well as tissue and specialty papers, have increased by 3% every year. High-quality papers can be recycled and reused in many subsequent applications, but it is not possible to recycle low-quality paper into higher-end papers. By 2030, about 500 million tonnes of paper and board would be produced across the globe owing to the increased demand for packaging. This trend is likely to drive the consumption of froth flotation chemicals. With

the increasing environmental regulations and initiatives towards sustainability, the recycling rate of paper is increasing across the globe.

The development of nano-based flotation chemicals where hydrophobic nanoparticles adsorb onto much larger hydrophilic mineral particle surfaces facilitates attachment to air bubbles in flotation. The adsorption of 46-nanometre cationic polystyrene nanoparticles onto 43-micrometer diameter glass beads, a mineral model, facilitates virtually complete removal of the beads by flotation.

The Global Froth Flotation Chemicals Market is segmented on the basis of Reagent and End-Use. The End-Use segment is further segmented as Mining, Pulp & Paper, Industrial Waste & Sewage Treatment, and Others. Among all the end-user industries, the mining industry was found to be the largest consumer of froth flotation chemicals. In terms of reagent type, collectors accounted for the largest share during the study period.

Froth flotation chemicals are used to separate finely liberated minerals. The reagents facilitate the attachment of air bubbles to selective minerals. The froth layer supports the minerals for removal or separation. The mining industry is the primary end-user industry for froth flotation chemicals, among others. Some of the major minerals that use froth flotation chemicals include concentrating ores of lead, copper, zinc, etc. Around 80% of the minerals concentration process across the globe is accomplished using froth flotation chemicals. Frothers in the mining industry are used in the flotation process are expected to offer fast kinetics and excellent selectivity and form dry but easy to break froths. A typical froth flotation process in the mining industry includes several processes, including liberation, conditioning, flotation, frothing, and separation, among others. Froth flotation process offers the mining industry significant flexibility to the mine to make tailor-made ores with specific properties. By varying the significant elements such as frothers, modifiers, collectors, the miners can filter the ores accordingly.

Currently, the mining industry is facing significant challenges in identifying and adopting sustainable froth flotation chemistries that can efficiently recover valued minerals in difficult-to-process low-grade resources. Some of the challenges include complex mineralogy and significant amounts of penalty gangue sulfide minerals (such as pyrite), which is a challenge to separate from valuable minerals at several mining operations worldwide. However, the market's growth is expected to be hindered by the existing challenges posed by frothers in terms of bubble size and airflow. This issue anticipated being tackled by the usage of tailor-made frothers for specific applications. Globally, the mining industry is undergoing consolidation; this can be witnessed with the decreasing

number of mid-cap miners from the industry. Major mining companies are increasing their market share through M&A activity, the formation of strategic ventures, and the divestiture of non-core assets. The ongoing technological advancements in the mining industry are expected to result in enhanced productivity and savings.

Based on geography, the global Food Grade Lubricants Market is segmented into Asia Pacific, North America, South America, Europe, and Middle East & Africa. Asia-Pacific was found to be the dominant region for the market. Major countries in the region include China and India with large mining operations. China is the largest consumer of froth flotation chemicals owing to the presence of large mining operations.

Amid the Covid-19 pandemic, there is an impact on both the production and consumption of paper in the country. Due to low business, the packaging industry has been hit hard, resulting in the low demand for paper and its products. The United States has been the largest exporter of paper and pulp products to China since 2010. With reduced demand for paper packaging, the demand for paper and pulp products is anticipated to come down, and the demand recovery would start in at least Q3 2020. In recent years, there has been a growth in the number of foreign mining companies acquiring assets in the United States. Though several non-US-based companies have long controlled most of the country's largest mines, the past several years have witnessed the entry of many new non-domestic players.

Some of the primary factors for this increase include the following:

- Declining stability and increasing security concerns in certain jurisdictions with traditionally strong mining sectors, such as Chile, Brazil, and Mexico
- The potential of regulatory reform by the Trump Administration aimed at speeding up the permitting process and loosening certain regulatory programs
- The availability of a skilled labor
- The number of world-class assets being brought online in the US over the last several years.

According to The American Forest & Paper Association (AF&PA), paper recycling in the country has witnessed consistent growth in recent years, and the recycling rate reached 66.2% in 2019, down from 68% in 2018. This decrease was mainly due to the sharp decline in the recovered paper exports in the backdrop of trade restrictions with China.

In 2019, the recycling rate for old corrugated containers (OCC) was 92%, and the three-year average OCC recycling rate is 92.3%. The wastewater and sewage treatment facilities in the country have increased at a significant rate. In 2018, the revenue from U.S. wastewater treatment valued at USD 63.1 billion from USD 61.2 billion in 2017. There is ongoing growth in waste generation in the country due to the increasing economic activities expected to drive the overall sewage and wastewater treatment industry in the coming years, thus driving the consumption of froth flotation chemicals.

Some of the key players in the froth floatation chemical market are Dow, Huntsman Corporation, BASF SE, Nouryon, Clariant, and QiXia TongDa Flotation Reagent Co., Ltd. among others.

In Jul 2020, BASF will provide its customers with total values of CO2 emissions, so-called “carbon footprints” for all of its products. The Product Carbon Footprint (PCF) comprises all product-related greenhouse gas emissions that occur from the purchased raw material to the use of energy in production processes.

In Apr 2019, BASF expanded the production of polyacrylamide powder in Nanjing, China. The additional capacity of 20,000 metric tons per year is to support mining customers located in the Asia-Pacific region.

Our Global Froth Flotation Chemical Market report provides deep insight into the current and future state of the Froth Flotation Chemicals Market across various regions. The study comprehensively analyzes the Froth Flotation Chemicals Market by segments based on Reagent (Collectors, Frothers, Modifiers, and Others), By End-Use (Mining, Pulp & Paper, Industrial Waste & Sewage Treatment, and Others), and by Geography (Asia Pacific, North America, Europe, South America, and Middle-East and Africa). The report examines the market drivers and restraints, along with the impact of Covid-19 are influencing the market growth in detail. The study covers & includes emerging market trends, market developments, market opportunities, market size, market analysis, market dynamics, and challenges in the industry. This report also covers extensively researched competitive landscape sections with profiles of major companies including their market share and projects.

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- ema
- OF SE
- anese Corporation
- minova
- iant
- Kelco
- da International Plc

ay

olab

ntsman International LLC

o Chemicals Europe. S.L.

saco International Ltd.

uryon

adra Chemicals

lvay

Kia TongDa Flotation Reagent Co., Ltd.

*es is not exhaustive*

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