

# Global Chelating Agents Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Chelating Agents competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Chelating agents are chemical compounds that react with metal ions to form a stable, water-soluble complex. They are also known as chelants, chelators, or sequestering agents. Chelating agents have a ring-like center which forms at least two bonds with the metal ion allowing it to be excreted. Chelating agents are usually organic compounds (a compound that contains carbon). In 2024, global Chelating Agents production reached approximately 1641 K MT, with an average global market price of around US\$ 1778 per MT. The chelating agents market is a sizeable, diversified segment of the specialty chemicals industry, supplying molecules that bind metal ions to improve performance, stability or safety in a wide array of applications. Major end uses include household and industrial detergents (preventing scale and enhancing cleaning), pulp and paper bleaching, water treatment, agriculture (micronutrient delivery), personal care, pharmaceuticals, food and beverage processing, oil and gas, and various industrial processes where metal-catalyzed reactions or deposits must be controlled. The portfolio ranges from traditional aminocarboxylates (like EDTA and NTA) to newer, more biodegradable agents (such as IDS, GLDA, MGDA) and specialized chelates for micronutrient fertilizers and high-purity applications. Global demand grows in the low- to mid-single-digit range, broadly reflecting industrial production, urbanization, and rising living standards, with cleaning, water treatment and agriculture as core engines of consumption and Asia-Pacific holding a growing share of both production and use. Across the industry chain, the upstream segment is based on petrochemical and inorganic raw materials such as ethylenediamine, formaldehyde, cyanides, caustic soda, ammonia, organic acids, and, in some newer products, bio-based feedstocks and

intermediates. Midstream, chelating agents manufacturers synthesize and neutralize these into acid or salt forms through multi-step reactions and purification, then concentrate, standardize and formulate them as liquids, powders or granules, often tailoring pH, stability and metal-binding profiles for specific applications; they also develop high-value metal chelate complexes (e.g., Fe, Zn, Mn, Cu chelates) for agriculture and nutrition. Downstream, formulators of detergents and cleaning products, water-treatment chemicals, agricultural micronutrients, personal care items, pharmaceuticals and food-processing aids integrate chelating agents into finished products to control hardness, prevent scale, improve bleach stability, deliver micronutrients and stabilize formulations. Key demand drivers include the growth of modern cleaning and hygiene, stricter water-quality standards, intensifying agriculture and micronutrient management, and the shift toward more environmentally benign, biodegradable chelants that can replace legacy molecules under regulatory and customer pressure; counterbalancing these are raw-material and energy cost volatility, regulatory scrutiny of certain legacy chemistries, and price competition in commoditized segments. Overall, chelating agents producers typically operate with moderate gross profit margins, most commonly in the range of about 18?30%, with margins toward the higher end for newer biodegradable and specialized metal-chelate products and toward the lower end for high-volume, traditional aminocarboxylate chemistries.

The global Chelating Agents market size was estimated at USD 2909.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 3.70% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Chelating Agents market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Chelating Agents market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of

market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Chelating Agents market.

### **Global Chelating Agents Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

BASF  
Nouryon  
Fuyang Biotech  
Dow  
Dongxiao Biotech  
Kaixiang BioChem  
Taihe Chem  
PMP  
Kemira  
Innospec  
Jungbunzlauer  
AVA Chemicals  
Roquette Freres  
Langyatai  
ADM  
Huntsman  
Qingshuiyuan

IRO Chelating

Tosoh

Jack Chem

### **Market Segmentation (by Type)**

Hydroxycarboxylic Acids

Organophosphonates

Aminopolycarboxylates

Others

### **Market Segmentation (by Application)**

Detergent

Water Treatment

Personal Care

Pulp & Paper

Food & Beverage

Others

### **Geographic Segmentation**

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

### **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Chelating Agents Market

Overview of the regional outlook of the Chelating Agents Market:

## Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

## Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Chelating Agents Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Chelating Agents, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change  
This enables you to anticipate market changes to remain ahead of your competitors  
You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain  
Market dynamics scenario, along with growth opportunities of the market in the years to come  
6-month post-sales analyst support

### **Customization of the Report**

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