

Global Caustic Soda Market: Analysis By Production Process (Membrane Cell, Diaphragm Cell and Others), By Application (Organic Chemicals, Inorganic Chemicals, Alumina, Pulp and Paper, Soap and Detergent, Water Treatment and Others), By Region Size & Forecast with Impact Analysis of COVID-19 and Forecast up to 2028

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Abstracts

Caustic soda or sodium hydroxide is an odorless, highly corrosive, non-flammable white solid which can also be used as an esterification and transesterification reagent and cleaning agent. It is widely consumed in chemical pulping involving sulphite, sulphate, and soda, among others. In 2022, the global caustic soda market was valued at US\$40.61 billion, and is probable to reach US\$56.89 billion by 2028. The global caustic soda market production capacity stood at 100.57 million tonnes in 2022 and is expected to reach 112.57 million tonnes in 2028.

The global caustic soda market growth is driven by various industries like pulp and paper industry, soap and detergent market, alumina market. There is an increasing demand for PVC globally and the expanding use of caustic soda in mining, metal processing, glass production, food and textile industry. Increase in innovation and development in manufacturing processes of caustic soda is anticipated to provide growth opportunities for the market growth. The global caustic soda market value is projected to grow at a CAGR of 5.78%, during the forecast period of 2023-2028. The global caustic soda market by production capacity would augment at a CAGR of 1.89% during the estimated period of 2023-2028.

Market Segmentation Analysis:

By Production Process: According to the report, the global caustic soda market is segmented into three production process: Membrane Cell, Diaphragm Cell and Others. Membrane Cell segment acquired majority of share in the market in 2022, owing to its environment friendly nature and low energy consumption. The membrane process for manufacturing caustic soda is considered as environmentally-safer than the diaphragm process due to use of asbestos in the latter leading to ESG concerns. Whereas, Diaphragm Cell segment is the fastest growing in the production process, as it has various advantages such as low electricity consumption and it can run on dilute impure brine and is compact in size.

By Application: According to the report, the global caustic soda market is bifurcated into seven applications: Organic Chemicals, Inorganic Chemicals, Pulp and Paper, Alumina, Soap and Detergent, Water Treatment and Others. Organic Chemicals segment acquired majority of share in the market in 2022, as about 60% of all chemical products are produced, directly or indirectly, using chlorine and/or caustic soda. Whereas, pulp and paper segment is expected to have the highest CAGR in the future as caustic soda is an crucial element in the production of paper and pulp because it is used to separate and dissolve cellulose fibers from lignin and also aids in the degradation of wood, which results in pulp.

By Region: The report provides insight into the caustic soda market based on the geographical operations, namely North America, Europe, Asia Pacific, and Rest of the World. Asia Pacific caustic soda market enjoyed the highest market share in 2022, primarily owing to rapid industrialization, urbanization, and population growth. Asia Pacific is largest producer of paper and pulp across the globe, which has led to the development of various caustic soda manufacturing companies. China is the greatest producer and consumer of caustic soda. The expansion of the textile sector in rising economies such as China, India, Vietnam, and Taiwan is primarily responsible for high product demand. Furthermore, Asia Pacific region is expected to grow at the fastest CAGR during the forecast period owing to rising use in industries such as aluminum and textiles.

Global Caustic Soda Market Dynamics:

Growth Drivers: Caustic soda is frequently used to extract alumina, the most prevalent oxides of aluminum. Because of its lightweight and durability, aluminum is suitable for carrying energy across great distances. Aluminum can be rolled into the correct shape and thickness using a continuous casting and cold rolling process. Therefore, leading to

the growth in the caustic soda market. Further, the market is expected to increase due to rising demand for alumina in the industry, rapid urbanization, surge in demand for pulp and paper, mounting use of caustic soda in textile industry, etc.

Challenges: Highly corrosive nature and stringent government regulations can become a challenge for caustic soda market in several ways as when used in large quantities, sodium hydroxide can be extremely dangerous, causing serious burns to the skin and eyes. When caustic soda comes into contact with the eyes, it can cause irreversible eye damage and blindness. The other challenge that caustic soda market faces is energy-intensive production processes and major environmental concerns, etc.

Trends: A major trend gaining pace in caustic soda market is surging demand for caustic soda in the water treatment industry. The water treatment industry is a key user of caustic soda, and the increasing demand for caustic soda in this industry would drive the caustic soda market's expansion. Caustic soda is used in the water treatment industry to adjust pH, neutralize water, and remove pollutants. More trends in the market are believed to augment the growth of caustic soda market during the forecasted period include growing importance of chlor-alkali products, technology advancements, augmenting demand from emerging economies, etc.

Impact Analysis of COVID-19 and Way Forward:

The market was negatively impacted by the COVID-19 pandemic in 2020. The coronavirus's impact on demand for chlorine derivatives has squeezed the supply of caustic soda, a by-product of chlorine production. However, the rising prevention due to the spread of COVID-19 increased the demand for soaps, which further propelled the demand for caustic soda, thereby driving the industry's growth.

Competitive Landscape and Recent Developments:

Global caustic soda market is fragmented. Key players of global caustic soda market are:

Solvay SA

SABIC

INEOS Group Holdings S.A.

The Dow Chemical Company

Formosa Plastics Corp

BASF SE

Olin Corporation

Occidental Petroleum Corporation

Tata Chemicals Limited

Grasim Industries Limited

Hanwha Chemical Group

Tosoh Corporation

Westlake Corporation

Shin-Etsu Chemical Co., Ltd

The key players are constantly investing in strategic initiatives, such as new product launches, introducing their products to emerging markets and more, to maintain a competitive edge in this market. For instance, February 2022, Occidental Petroleum's chemical division is considering an overhaul of some chlor-alkali plants to increase capacity to produce higher-value caustic soda. This will give it the chance to make a big change to its current capacity in order to meet the growing demand for its key products. Also, In January 2021, Shin-Etsu Chemical Co. announced the plans to further increase its production capacity of caustic soda by 390,000 m.t. /yr. The project construction is expected to be completed by end of 2023.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Caustic Soda: An Overview

2.1.1 Uses of Caustic Soda

2.1.2 Caustic Soda Production Process Comparison

2.2 Caustic Soda Segmentation: An Overview

2.2.1 Caustic Soda Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Caustic Soda Market: An Analysis

3.1.1 Global Caustic Soda Market: An Overview

3.1.2 Global Caustic Soda Market by Value

3.1.3 Global Caustic Soda Market by Production Process (Membrane Cell, Diaphragm Cell and Others)

3.1.4 Global Caustic Soda Market by Application (Organic Chemicals, Inorganic Chemicals, Pulp and Paper, Alumina, Soap and Detergent, Water Treatment and Others)

3.1.5 Global Caustic Soda Market by Region (Asia Pacific, North America, Europe and Rest of the World)

3.2 Global Caustic Soda Market Production Capacity: An Analysis

3.2.1 Global Caustic Soda Market Production Capacity: An Overview

3.2.2 Global Caustic Soda Market by Production Capacity

3.2.3 Global Caustic Soda Market Production Capacity by Region (Asia Pacific, Europe, North America and Rest of the world)

3.3 Global Caustic Soda Market: Production Process Analysis

3.3.1 Global Caustic Soda Market by Production Process: An Overview

3.3.2 Global Membrane Cell Caustic Soda Market by Value

3.3.3 Global Diaphragm Cell Caustic Soda Market by Value

3.3.4 Global Other Caustic Soda Market by Value

3.4 Global Caustic Soda Market: Application Analysis

3.4.1 Global Caustic Soda Market by Application: An Overview

3.4.2 Global Organic Chemicals Caustic Soda Market by Value

3.4.3 Global Inorganic Chemicals Caustic Soda Market by Value

3.4.4 Global Pulp and Paper Caustic Soda Market by Value

- 3.4.5 Global Alumina Caustic Soda Market by Value
- 3.4.6 Global Soap and Detergent Caustic Soda Market by Value
- 3.4.7 Global Water Treatment Caustic Soda Market by Value
- 3.4.8 Global Other Applications Caustic Soda Market by Value

4. REGIONAL MARKET ANALYSIS

4.1 Asia Pacific Caustic Soda Market: An Analysis

- 4.1.1 Asia Pacific Caustic Soda Market: An Overview
- 4.1.2 Asia Pacific Caustic Soda Market by Value
- 4.1.3 Asia Pacific Caustic Soda Market by Region (China, Japan, India and Rest of Asia Pacific)
- 4.1.4 China Caustic Soda Market by Value
- 4.1.5 Japan Caustic Soda Market by Value
- 4.1.6 India Caustic Soda Market by Value
- 4.1.7 Rest of Asia Pacific Caustic Soda Market by Value
- 4.1.8 Asia Pacific Caustic Soda Market by Production Capacity
- 4.1.9 Asia Pacific Caustic Soda Market Production Capacity by Region (China, India and rest of Asia Pacific)
- 4.1.10 China Caustic Soda Market by Production Capacity
- 4.1.11 India Caustic Soda Market by Production Capacity
- 4.1.12 Rest of Asia Pacific Caustic Soda Market by Production Capacity

4.2 North America Caustic Soda Market: An Analysis

- 4.2.1 North America Caustic Soda Market: An Overview
- 4.2.2 North America Caustic Soda Market by Value
- 4.2.3 North America Caustic Soda Market by Region (The US, Canada and Mexico)
- 4.2.4 The US Caustic Soda Market by Value
- 4.2.5 Canada Caustic Soda Market by Value
- 4.2.6 Mexico Caustic Soda Market by Value
- 4.2.7 North America Caustic Soda Market by Production Capacity

4.3 Europe Caustic Soda Market: An Analysis

- 4.3.1 Europe Caustic Soda Market: An Overview
- 4.3.2 Europe Caustic Soda Market by Value
- 4.3.3 Europe Caustic Soda Market by Region (Germany, UK and Rest of Europe)
- 4.3.4 Germany Caustic Soda Market by Value
- 4.3.5 UK Caustic Soda Market by Value
- 4.3.6 Rest of Europe Caustic Soda Market by Value
- 4.3.7 Europe Caustic Soda Market by Production Capacity

4.4 Rest of the World Caustic Soda Market: An Analysis

- 4.4.1 Rest of the World Caustic Soda Market: An Overview
- 4.4.2 Rest of the World Caustic Soda Market by Value
- 4.4.3 Rest of the World Caustic Soda Market by Production Capacity

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19
 - 5.1.1 Impact of COVID-19 on Caustic Soda
 - 5.1.2 Post COVID-19 Impact

6. MARKET DYNAMICS

- 6.1 Growth Drivers
 - 6.1.1 Rising Demand for Alumina in the Industry
 - 6.1.2 Surge in Demand in Pulp and Paper
 - 6.1.3 Rapid Urbanization
 - 6.1.4 Mounting Use of Caustic Soda in Textile Industry
- 6.2 Challenges
 - 6.2.1 Highly Corrosive Nature and Stringent Government Regulations
 - 6.2.2 Energy-intensive Production Processes and Major Environmental Concerns
- 6.3 Market Trends
 - 6.3.1 Surging Demand for Caustic Soda in the Water Treatment Industry
 - 6.3.2 Growing Importance of Chlor-Alkali Products
 - 6.3.3 Technology Advancements
 - 6.3.4 Augmenting Demand from Emerging Economies

7. COMPETITIVE LANDSCAPE

- 7.1 Global Caustic Soda Market Players: Product Comparison
- 7.2 India Caustic Soda Market Players: Capacity Comparison

8. COMPANY PROFILES

- 8.1 Solvay SA
 - 8.1.1 Business Overview
 - 8.1.2 Operating Segment
 - 8.1.3 Business Strategies
- 8.2 SABIC
 - 8.2.1 Business Overview

- 8.2.2 Operating Segments
- 8.2.3 Business Strategy
- 8.3 INEOS Group Holdings S.A.
 - 8.3.1 Business Overview
 - 8.3.2 Operating Segments
 - 8.3.3 Business Strategy
- 8.4 The Dow Chemical Company
 - 8.4.1 Business Overview
 - 8.4.2 Operating Segments
 - 8.4.3 Business Strategy
- 8.5 BASF SE
 - 8.5.1 Business Overview
 - 8.5.2 Operating Segments
 - 8.5.3 Business Strategy
- 8.6 Olin Corporation
 - 8.6.1 Business Overview
 - 8.6.2 Operating Segments
 - 8.6.3 Business Strategy
- 8.7 Occidental Petroleum Corporation
 - 8.7.1 Business Overview
 - 8.7.2 Operating Segments
 - 8.7.3 Business Strategy
- 8.8 Tata Chemicals Limited
 - 8.8.1 Business Overview
 - 8.8.2 Operating Segments
 - 8.8.3 Business Strategy
- 8.9 Grasim Industries Limited
 - 8.9.1 Business Overview
 - 8.9.2 Operating Segments
 - 8.9.3 Business Strategy
- 8.10 Hanwha Chemical Group
 - 8.10.1 Business Overview
 - 8.10.2 Operating Business
 - 8.10.3 Business Strategy
- 8.11 Tosoh Corporation
 - 8.11.1 Business Overview
 - 8.11.2 Operating Segments
 - 8.11.3 Business Strategy
- 8.12 Westlake Corporation

8.12.1 Business Overview

8.12.2 Operating Segments

8.12.3 Business Strategy

8.13 Shin-Etsu Chemical Co., Ltd.

8.13.1 Business Overview

8.13.2 Operating Segments

8.13.3 Business Strategy

8.14 Formosa Plastics Corp

8.14.1 Business Overview

8.14.2 Business Strategy

List Of Figures

LIST OF FIGURES

Figure 1: Uses of Caustic Soda

Figure 2: Caustic Soda Segmentation

Figure 3: Global Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 4: Global Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 5: Global Caustic Soda Market by Production Process; 2022 (Percentage, %)

Figure 6: Global Caustic Soda Market by Application; 2022 (Percentage, %)

Figure 7: Global Caustic Soda Market by Region; 2022 (Percentage, %)

Figure 8: Global Caustic Soda Market by Production Capacity; 2021-2022 (Million Tonnes)

Figure 9: Global Caustic Soda Market by Production Capacity; 2023-2028 (Million Tonnes)

Figure 10: Global Caustic Soda Market Production Capacity by Region; 2022 (Percentage, %)

Figure 11: Global Membrane Cell Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 12: Global Membrane Cell Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 13: Global Diaphragm Cell Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 14: Global Diaphragm Cell Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 15: Global Other Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 16: Global Other Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 17: Global Organic Chemicals Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 18: Global Organic Chemicals Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 19: Global Inorganic Chemicals Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 20: Global Inorganic Chemicals Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 21: Global Pulp and Paper Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 22: Global Pulp and Paper Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 23: Global Alumina Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 24: Global Alumina Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 25: Global Soap and Detergent Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 26: Global Soap and Detergent Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 27: Global Water Treatment Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 28: Global Water Treatment Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 29: Global Other Applications Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 30: Global Other Applications Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 31: Asia Pacific Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 32: Asia Pacific Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 33: Asia Pacific Caustic Soda Market by Region; 2022 (Percentage, %)

Figure 34: China Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 35: China Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 36: Japan Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 37: Japan Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 38: India Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 39: India Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 40: Rest of Asia Pacific Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 41: Rest of Asia Pacific Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 42: Asia Pacific Caustic Soda Market by Production Capacity; 2021-2022 (Million Tonnes)

Figure 43: Asia Pacific Caustic Soda Market by Production Capacity; 2023-2028 (Million Tonnes)

Figure 44: Asia Pacific Caustic Soda Market Production Capacity by Region; 2022 (Percentage, %)

Figure 45: China Caustic Soda Market by Production Capacity; 2021-2022 (Million Tonnes)

Figure 46: China Caustic Soda Market by Production Capacity; 2023-2028 (Million Tonnes)

Figure 47: India Caustic Soda Market by Production Capacity; 2021-2022 (Million Tonnes)

Figure 48: India Caustic Soda Market by Production Capacity; 2023-2028 (Million Tonnes)

Figure 49: Rest of Asia Pacific Caustic Soda Market by Production Capacity; 2021-2022 (Million Tonnes)

Figure 50: Rest of Asia Pacific Caustic Soda Market by Production Capacity; 2023-2028 (Million Tonnes)

Figure 51: North America Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 52: North America Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 53: North America Caustic Soda Market by Region; 2022 (Percentage, %)

Figure 54: The US Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 55: The US Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 56: Canada Caustic Soda Market by Value; 2018-2022 (US\$ Million)

Figure 57: Canada Caustic Soda Market by Value; 2023-2028 (US\$ Million)

Figure 58: Mexico Caustic Soda Market by Value; 2018-2022 (US\$ Million)

Figure 59: Mexico Caustic Soda Market by Value; 2023-2028 (US\$ Million)

Figure 60: North America Caustic Soda Market by Production Capacity; 2021-2022 (Million Tonnes)

Figure 61: North America Caustic Soda Market by Production Capacity; 2023-2028 (Million Tonnes)

Figure 62: Europe Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 63: Europe Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 64: Europe Caustic Soda Market by Region; 2022 (Percentage, %)

Figure 65: Germany Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 66: Germany Caustic Soda Market by Value; 2023-2021 (US\$ Billion)

Figure 67: UK Caustic Soda Market by Value; 2018-2022 (US\$ Million)

Figure 68: UK Caustic Soda Market by Value; 2023-2028 (US\$ Million)

Figure 69: Rest of Europe Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 70: Rest of Europe Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 71: Europe Caustic Soda Market by Production Capacity; 2021-2022 (Million Tonnes)

Figure 72: Europe Caustic Soda Market by Production Capacity; 2023-2028 (Million Tonnes)

Figure 73: Rest of the World Caustic Soda Market by Value; 2018-2022 (US\$ Billion)

Figure 74: Rest of the World Caustic Soda Market by Value; 2023-2028 (US\$ Billion)

Figure 75: Rest of the World Caustic Soda Market by Production Capacity; 2021-2022 (Million Tonnes)

Figure 76: Rest of the World Caustic Soda Market by Production Capacity; 2023-2028 (Million Tonnes)

Figure 77: Global Alumina Production; 2018-2022 (Thousand Metric Tonnes)

Figure 78: Global Pulp and Paper Market; 2021-2029 (US\$ Billion)

Figure 79: Global Urban Population; 2016, 2021 & 2050 (Billion)

- Figure 80: Global Water Treatment Market by Value; 2022-2028 (US\$ Billion)
- Figure 81: Solvay SA Net Sales by Segment; 2022 (Percentage, %)
- Figure 82: SABIC Sales by Segments; 2022 (Percentage, %)
- Figure 83: INEOS Group Holdings S.A. Revenue by Segments; 2022 (Percentage, %)
- Figure 84: The Dow Chemical Company Net Sales by Segments; 2022 (Percentage, %)
- Figure 85: BASF SE Sales by Segments; 2022 (Percentage, %)
- Figure 86: Olin Corporation Sales by Segments; 2022 (Percentage, %)
- Figure 87: Occidental Petroleum Corporation Net Sales by Segments; 2022 (Percentage, %)
- Figure 88: Tata Chemicals Limited Revenue by Segments; 2022 (Percentage, %)
- Figure 89: Grasim Industries Limited Revenue by Segments; 2022 (Percentage, %)
- Figure 90: Hanwha Chemical Group Sales by Business; 2021 (Percentage, %)
- Figure 91: Tosoh Corporation Net Sales by Segments; 2022 (Percentage, %)
- Figure 92: Westlake Corporation Net Sales by Segments; 2022 (Percentage, %)
- Figure 93: Shin-Etsu Chemical Co., Ltd. Sales by Segments; 2022 (Percentage, %)
- Table 1: Caustic Soda Production Process Comparison
- Table 2: Global Caustic Soda Market Players: Product Comparison
- Table 3: India Caustic Soda Market Players: Capacity Comparison

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