

Global Specialty Chemicals Market: Analysis By End Use (Pharmaceuticals, Agrochemicals and Fertilizers, Construction Chemicals, Home Care Ingredients, Dyes and Pigments, Water Treatment Chemicals, Electronics and Electrical Chemicals, Flavor and Fragrances Ingredients, Paints and Coating Additives, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

Specialty chemicals, also referred to as specialities or effect chemicals, are chemical compounds that are procured & consumed in smaller quantities and are generally based on tailor made formulations for specific customer application, function and performance. Specialty chemicals are low-volume and high-value products, sold based on their quality or utility. Thus, they may be used primarily as additives or to provide a specific attribute to the end-products. The focus is on value addition to the end products. The global specialty chemicals market was valued at US\$738.23 billion in 2022. The market value is forecasted to grow to US\$998.94 billion by 2028.

The increasing per capita disposable income and change in consumer preferences have led to an improvement in demand for end-user industries such as pharmaceuticals, agrochemicals and home/personal care products. This has led to the rising demand for specialty chemicals. Other significant factor is consolidation. Downstream value-added opportunities have led companies to expand their product portfolios towards high-growth and high-margin products or obtaining access to technological knowhow through M&A activities. Therefore, with rising trend of consolidation allowing specialty chemical companies to expand geographical coverage

and enter into high emerging markets by working with regional manufacturers, the global specialty chemicals market will continue to grow positively in the forecasted period. The market is anticipated to grow at a CAGR of approx. 5% during the forecasted period of 2023-2028.

Market Segmentation Analysis:

By End Use: The report provides the bifurcation of the market into ten segments based on end use: pharmaceuticals, agrochemicals & fertilizers, construction chemicals, home care ingredients, dyes & pigments, water treatment chemicals, electronics & electrical chemicals, flavor & fragrances ingredients, paints & coating additives, and others. Pharmaceutical specialty chemicals market held the largest share in the global specialty chemicals market, owing to increasing application of specialty chemicals in pharmaceutical business such as the production of medications for cardiovascular disorders, skin problems, and Hughes syndrome; growing need for innovative and effective drugs to treat a range of diseases and medical conditions; increasing investment in research and development in the pharmaceutical industry; growing trend towards personalized medicine; and new emerging opportunities for collaboration and partnerships between specialty chemical manufacturers and pharmaceutical companies.

By Region: The report provides insight into the specialty chemicals market based on the regions namely, Asia Pacific, North America, Europe, Middle East and Africa, and Latin America. Asia Pacific specialty chemicals market is both the largest and fastest growing region in global specialty chemicals market, driven by rapid urbanization, growing demand for application specific chemical compounds in construction and manufacturing sector, increasing population growth, rising awareness among farmers regarding the use of agrochemicals, ongoing investments in building & infrastructure improvement projects and rapidly expanding end user industries. Asia Pacific specialty chemicals market is divided into four regions on the basis of geographical operations, namely, China, Japan, India, and rest of Asia Pacific, where China specialty chemicals market held the largest share in Asia Pacific specialty chemicals market, owing to large chemical production base, growing business opportunities, rapid industrialization, rising expendable cash, growing demand for high performance materials and high desire for improved aesthetics in domestic construction.

India specialty chemicals market is the fastest growing region within Asia Pacific, owing to rise in consumption of end-user products, rapid growth of agrochemical industry, increasing number of companies shifting their manufacturing base due to cheap labor

and easy availability of raw materials and supportive Government policies. Developments and opportunities together would drive India to become the hub for specialty chemicals manufacturing over the coming decade.

Market Dynamics:

Growth Drivers: The global specialty chemicals market has been growing over the past few years, due to factors such as growth of chemical industry, rising demand from other end user industries, urbanization, increased demand for high performance materials, etc. Rapid urbanization coupled with increasing population growth, rising disposable income, increased standard of living and ongoing investment in building & infrastructure activities has been positively contributing towards increased demand for low cost and efficient specialty chemicals for improving crop quality, building new commercial and residential construction projects, and meeting up with the increased demand for consumer goods like packaged food & beverages, personal care and cosmetics, electronics, etc. So, with majority of world's population expected to live in urban areas, particularly in developing regions, there will be an increasing demand for specialty chemicals. Therefore, rapid urbanization coupled with rising population growth will continue to boost the growth of global specialty chemicals market.

Challenges: However, the market growth would be negatively impacted by various challenges such as growing environmental and safety concerns, fluctuating prices of raw materials, etc. Production process involving the manufacturing of specialty chemicals results in the emission of various greenhouse gases like carbon dioxide, chlorofluorocarbons, hydrochlorofluorocarbons, methyl chloride etc. which are main contributors to air pollution, ozone layer depletion and global warming, having both adverse effect on environment in terms of climate change and negative effects on human health in the form of skin and eye allergies, chronic bronchitis, asthma etc. Therefore, rising environmental concerns will have negative effect on the demand for specialty chemicals by end users, impeding the growth of the market in the forecasted years.

Trends: The market is projected to grow at a fast pace during the forecasted period, due to various latest trends such as increasing integration of AI and ML, consolidation, rising demand for sustainable specialty chemicals, technological advancements in manufacturing process, etc. Automation and digital technologies like artificial intelligence, machine learning, and big data analytics are increasingly used by specialty chemical manufacturers to optimize production processes, improve product quality, and discover new applications for specialty chemicals, resulting in lower production costs &

higher product quality for chemical manufacturers. Also, AI is increasingly used to predict product quality based on process parameters, such as temperature, pressure, and flow rate, allowing for real-time adjustments to be made, increasing process efficiency and ensuring consistent product quality. Therefore, increasing integration of artificial intelligence (AI) and machine learning (ML) in specialty chemicals production process will continue to boost the growth of global specialty chemicals market in the forecasted years.

Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. Lockdown policies, imposed by the government to prevent the spread of virus forced various end user industries to either shut down or run low on production capacity, resulting in lower production and manufacturing activities by various end user industries and since end user industries including automotive, electronics, construction, textiles, pharmaceuticals, etc. demand specialty chemicals like adhesives, colors, materials for cleaning purposes, construction chemicals, industrial gases, cosmetic additives, etc., for providing unique and tailored properties that are essential to the performance and quality of end-use products, there was a sudden fall in the demand of specialty chemicals as result of reduced production activities, having negative impact on both demand and consumption of specialty chemical compounds, impeding the growth of the global specialty chemicals market in 2020. Also, COVID-19 pandemic resulted in supply chain disruptions, untimely delivery of raw material needed to manufacture specialty chemicals and logistics disruptions in the supply of various intermediary chemicals, creating an immense strain on supply chain networks with warehouses and ports suffering from severe congestion, cargo ships experiencing delays in unloading cargo and end user consumers experiencing unreliability in terms of delivery time of chemicals, negatively impacting the growth of global specialty chemicals market.

Competitive Landscape:

Specialty chemicals market is seen to be fragmented and highly competitive with large number of small and medium-sized specialty chemical companies operating in the market and striving to differentiate themselves based on product quality, performance, and innovation. The key players of the market are also adopting various key development strategies to meet the increased demand from various industries, including increased R&D investment, strategic partnerships, mergers, acquisition & collaboration

as well as developing new solutions in order to broaden and strengthen their current portfolios, while attracting new customers.

The key players of the market are:

Solvay SA

The Dow Chemical Company

Sika AG

Huntsman Corporation

BASF SE

Evonik Industries AG

Clariant AG

Albemarle Corporation

Croda International Plc

Arkema Group (Arkema S.A.)

LANXESS AG

The Lubrizol Corporation

Hexion Inc.

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