

Global Industrial Sulfamate / Sulfamate Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Industrial Sulfamate / Sulfamate market size is expected to reach \$ 597 million by 2032, rising at a market growth of 9.9% CAGR during the forecast period (2026-2032).

Industrial sulfamates / sulfamates refer to a class of inorganic chemical salts with the sulfamate anion (H_2NSO_3^-), produced by neutralizing sulfamic acid ($\text{NH}_2\text{SO}_3\text{H}$) with various cations. Key varieties include ammonium sulfamate ($\text{NH}_4\text{SO}_3\text{NH}_2$), used as a low-toxicity herbicide, flame retardant for paper/textiles, and nitrous oxide generator in agriculture, firefighting and tobacco processing; sodium sulfamate (NaH_2NSO_3), serving as an electroplating additive (nickel plating brightener) and metal surface cleaner with scale/rust removal efficiency far superior to hydrochloric acid, and also used in wastewater treatment and textile printing auxiliaries; nickel sulfamate ($\text{Ni}(\text{H}_2\text{NSO}_3)_2 \cdot x\text{H}_2\text{O}$), a primary electroplating salt that delivers extremely low internal stress in deposited coatings, making it essential for PCB plating and precision electroforming in aerospace and automotive components. With their low corrosivity, environmental compatibility and multi-scene adaptability, industrial sulfamates offer irreplaceable technological value in metal surface treatment, industrial cleaning, electroplating, flame-retardant materials and agricultural chemicals, representing a widely used industrial salt system in the fine chemical sector.

Industrial sulfamates are fine chemical salts based on the sulfamate anion, converting the weak acidity, thermal stability and metal-complexing ability of sulfamic acid into industrially usable salt forms. The three mainstream varieties – nickel sulfamate, sodium sulfamate and ammonium sulfamate – dominate three distinct downstream markets: low-stress electroforming, environmentally friendly cleaning and intumescent flame retardancy. On pricing, industrial-grade sodium sulfamate trades at USD

800–1,200/ton, ammonium sulfamate at USD 1,000–1,500/ton, while high-purity electronic-grade nickel sulfamate concentrate (500–600 g/L) reaches USD 5,000–8,000/ton. Gross margins diverge sharply: commodity sodium/ammonium salts achieve only 15–20% under intense competition, whereas producers mastering high-purity nickel sulfamate crystallization and impurity control (Nippon Chemical Industrial, Atotech/MKS) enjoy 35–45% margins with strong customer lock-in. Downstream primary applications: electroplating & electroforming (PCBs, semiconductor lead frames, automotive/aerospace parts) consumes about 50% of the total sulfamate value, with nickel sulfamate contributing the vast majority of that segment; metal cleaning & surface treatment accounts for ~25% (sodium sulfamate replacing hydrochloric/sulfuric acid for descaling boilers and heat exchangers); flame retardants ~15% (ammonium sulfamate for halogen-free treatment of paper, textiles and polyurethane foams); agricultural herbicides and others ~10%. Incremental demand is driven by three trends: (1) AI servers and advanced packaging boosting high-end PCB and substrate nickel plating; (2) tightening environmental regulations driving substitution of sulfamate for strong acids in industrial cleaning; (3) lightweight EV components (Al/Mg alloys) and integrated die-casting mould electroforming requiring low-stress nickel deposits. Landscape: Japanese players (Nippon Chemical Industrial, Nikko Metal) maintain a generational lead in high-purity nickel sulfamate crystallization and bath formulations; Atotech (MKS) and MacDermid Enthone capture high-end customer channels through complete electroplating line solutions; BASF, Solvay and other integrated giants hold sulfamic acid raw material capacity but invest limitedly in fine salts; Chinese producers (Shandong Haihua, Hubei Xinrund, Jiangsu Jiafeng) have cost advantages in mass production of sodium/ammonium sulfamates, but still lag in batch-to-batch stability and impurity control for electronic-grade nickel sulfamate, so the high-end market remains import-dependent. Uncertainties include: raw material price/availability of dicyandiamide (key intermediate for sulfamic acid); nickel price (LME) volatility directly impacting nickel sulfamate cost and buyers' willingness; and potential PFAS regulations affecting sulfamate-based surfactants. Conclusion: Industrial sulfamates represent a fine-chemical sector with both commodity and specialty segments. Sodium/ammonium salts are mature and price-competitive, while high-purity nickel sulfamate is in early-to-mid growth, where technical barriers and lengthy customer qualification create a strong moat. Over the next five years, high-end electronics plating and green cleaning substitution will be the major volume/value drivers, and companies that combine upstream sulfamic acid integration with consistent impurity control in electronic-grade nickel salt will capture the highest value in the chain.

This report studies the global Industrial Sulfamate / Sulfamate production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Industrial Sulfamate / Sulfamate and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Industrial Sulfamate / Sulfamate that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Industrial Sulfamate / Sulfamate total production and demand, 2021-2032, (Tons)

Global Industrial Sulfamate / Sulfamate total production value, 2021-2032, (USD Million)

Global Industrial Sulfamate / Sulfamate production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Industrial Sulfamate / Sulfamate consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Industrial Sulfamate / Sulfamate domestic production, consumption, key domestic manufacturers and share

Global Industrial Sulfamate / Sulfamate production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Industrial Sulfamate / Sulfamate production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Industrial Sulfamate / Sulfamate production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Industrial Sulfamate / Sulfamate market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Nippon Chemical Industrial, Kanto Chemical, Nihon Kagaku Sangyo, Technic, Umicore, BASF, Solvay, Shandong Mingda Chemical, Hebei Liuhe Chemical, Shandong Xingda Chemical, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Industrial Sulfamate / Sulfamate market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Industrial Sulfamate / Sulfamate Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Industrial Sulfamate / Sulfamate Market, Segmentation by Type:

Ammonium Sulfamate

Sodium Sulfamate

Nickel Sulfamate

Other Metal Sulfamates

Global Industrial Sulfamate / Sulfamate Market, Segmentation by Form:

Solid - Technical Grade (?95% purity)

Solid - High Purity Grade (?98% purity)

Concentrated Solution - Electronic Grade (metal ions

Contents

1 SUPPLY SUMMARY

- 1.1 Industrial Sulfamate / Sulfamate Introduction
- 1.2 World Industrial Sulfamate / Sulfamate Supply & Forecast
 - 1.2.1 World Industrial Sulfamate / Sulfamate Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Industrial Sulfamate / Sulfamate Production (2021-2032)
 - 1.2.3 World Industrial Sulfamate / Sulfamate Pricing Trends (2021-2032)
- 1.3 World Industrial Sulfamate / Sulfamate Production by Region (Based on Production Site)
 - 1.3.1 World Industrial Sulfamate / Sulfamate Production Value by Region (2021-2032)
 - 1.3.2 World Industrial Sulfamate / Sulfamate Production by Region (2021-2032)
 - 1.3.3 World Industrial Sulfamate / Sulfamate Average Price by Region (2021-2032)
 - 1.3.4 China Industrial Sulfamate / Sulfamate Production (2021-2032)
 - 1.3.5 Japan Industrial Sulfamate / Sulfamate Production (2021-2032)
 - 1.3.6 Europe Industrial Sulfamate / Sulfamate Production (2021-2032)
 - 1.3.7 North America Industrial Sulfamate / Sulfamate Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Industrial Sulfamate / Sulfamate Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Industrial Sulfamate / Sulfamate Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Industrial Sulfamate / Sulfamate Demand (2021-2032)
- 2.2 World Industrial Sulfamate / Sulfamate Consumption by Region
 - 2.2.1 World Industrial Sulfamate / Sulfamate Consumption by Region (2021-2026)
 - 2.2.2 World Industrial Sulfamate / Sulfamate Consumption Forecast by Region (2027-2032)
- 2.3 United States Industrial Sulfamate / Sulfamate Consumption (2021-2032)
- 2.4 China Industrial Sulfamate / Sulfamate Consumption (2021-2032)
- 2.5 Europe Industrial Sulfamate / Sulfamate Consumption (2021-2032)
- 2.6 Japan Industrial Sulfamate / Sulfamate Consumption (2021-2032)
- 2.7 South Korea Industrial Sulfamate / Sulfamate Consumption (2021-2032)
- 2.8 ASEAN Industrial Sulfamate / Sulfamate Consumption (2021-2032)
- 2.9 India Industrial Sulfamate / Sulfamate Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Industrial Sulfamate / Sulfamate Production Value by Manufacturer (2021-2026)
- 3.2 World Industrial Sulfamate / Sulfamate Production by Manufacturer (2021-2026)
- 3.3 World Industrial Sulfamate / Sulfamate Average Price by Manufacturer (2021-2026)
- 3.4 Industrial Sulfamate / Sulfamate Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Industrial Sulfamate / Sulfamate Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Industrial Sulfamate / Sulfamate in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Industrial Sulfamate / Sulfamate in 2025
- 3.6 Industrial Sulfamate / Sulfamate Market: Overall Company Footprint Analysis
 - 3.6.1 Industrial Sulfamate / Sulfamate Market: Region Footprint
 - 3.6.2 Industrial Sulfamate / Sulfamate Market: Company Product Type Footprint
 - 3.6.3 Industrial Sulfamate / Sulfamate Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Industrial Sulfamate / Sulfamate Production Value Comparison
 - 4.1.1 United States VS China: Industrial Sulfamate / Sulfamate Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Industrial Sulfamate / Sulfamate Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Industrial Sulfamate / Sulfamate Production Comparison
 - 4.2.1 United States VS China: Industrial Sulfamate / Sulfamate Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Industrial Sulfamate / Sulfamate Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Industrial Sulfamate / Sulfamate Consumption Comparison

4.3.1 United States VS China: Industrial Sulfamate / Sulfamate Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Industrial Sulfamate / Sulfamate Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Industrial Sulfamate / Sulfamate Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Industrial Sulfamate / Sulfamate Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Industrial Sulfamate / Sulfamate Production Value (2021-2026)

4.4.3 United States Based Manufacturers Industrial Sulfamate / Sulfamate Production (2021-2026)

4.5 China Based Industrial Sulfamate / Sulfamate Manufacturers and Market Share

4.5.1 China Based Industrial Sulfamate / Sulfamate Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Industrial Sulfamate / Sulfamate Production Value (2021-2026)

4.5.3 China Based Manufacturers Industrial Sulfamate / Sulfamate Production (2021-2026)

4.6 Rest of World Based Industrial Sulfamate / Sulfamate Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Industrial Sulfamate / Sulfamate Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Industrial Sulfamate / Sulfamate Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Industrial Sulfamate / Sulfamate Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Industrial Sulfamate / Sulfamate Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Ammonium Sulfamate

5.2.2 Sodium Sulfamate

5.2.3 Nickel Sulfamate

5.2.4 Other Metal Sulfamates

5.3 Market Segment by Type

5.3.1 World Industrial Sulfamate / Sulfamate Production by Type (2021-2032)

5.3.2 World Industrial Sulfamate / Sulfamate Production Value by Type (2021-2032)

5.3.3 World Industrial Sulfamate / Sulfamate Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY FORM

6.1 World Industrial Sulfamate / Sulfamate Market Size Overview by Form: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Form

6.2.1 Solid - Technical Grade (?95% purity)

6.2.2 Solid - High Purity Grade (?98% purity)

6.2.3 Concentrated Solution - Electronic Grade (metal ions)

List Of Tables

LIST OF TABLES

Table 1. World Industrial Sulfamate / Sulfamate Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Industrial Sulfamate / Sulfamate Production Value by Region (2021-2026) & (USD Million)

Table 3. World Industrial Sulfamate / Sulfamate Production Value by Region (2027-2032) & (USD Million)

Table 4. World Industrial Sulfamate / Sulfamate Production Value Market Share by Region (2021-2026)

Table 5. World Industrial Sulfamate / Sulfamate Production Value Market Share by Region (2027-2032)

Table 6. World Industrial Sulfamate / Sulfamate Production by Region (2021-2026) & (Tons)

Table 7. World Industrial Sulfamate / Sulfamate Production by Region (2027-2032) & (Tons)

Table 8. World Industrial Sulfamate / Sulfamate Production Market Share by Region (2021-2026)

Table 9. World Industrial Sulfamate / Sulfamate Production Market Share by Region (2027-2032)

Table 10. World Industrial Sulfamate / Sulfamate Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World Industrial Sulfamate / Sulfamate Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. Industrial Sulfamate / Sulfamate Major Market Trends

Table 13. World Industrial Sulfamate / Sulfamate Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)

Table 14. World Industrial Sulfamate / Sulfamate Consumption by Region (2021-2026) & (Tons)

Table 15. World Industrial Sulfamate / Sulfamate Consumption Forecast by Region (2027-2032) & (Tons)

Table 16. World Industrial Sulfamate / Sulfamate Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Industrial Sulfamate / Sulfamate Producers in 2025

Table 18. World Industrial Sulfamate / Sulfamate Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key Industrial Sulfamate / Sulfamate Producers in 2025

Table 20. World Industrial Sulfamate / Sulfamate Average Price by Manufacturer (2021-2026) & (US\$/Ton)

Table 21. Global Industrial Sulfamate / Sulfamate Company Evaluation Quadrant

Table 22. World Industrial Sulfamate / Sulfamate Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Industrial Sulfamate / Sulfamate Production Site of Key Manufacturer

Table 24. Industrial Sulfamate / Sulfamate Market: Company Product Type Footprint

Table 25. Industrial Sulfamate / Sulfamate Market: Company Product Application Footprint

Table 26. Industrial Sulfamate / Sulfamate Competitive Factors

Table 27. Industrial Sulfamate / Sulfamate New Entrant and Capacity Expansion Plans

Table 28. Industrial Sulfamate / Sulfamate Mergers & Acquisitions Activity

Table 29. United States VS China Industrial Sulfamate / Sulfamate Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Industrial Sulfamate / Sulfamate Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China Industrial Sulfamate / Sulfamate Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based Industrial Sulfamate / Sulfamate Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Industrial Sulfamate / Sulfamate Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Industrial Sulfamate / Sulfamate Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Industrial Sulfamate / Sulfamate Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers Industrial Sulfamate / Sulfamate Production Market Share (2021-2026)

Table 37. China Based Industrial Sulfamate / Sulfamate Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Industrial Sulfamate / Sulfamate Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Industrial Sulfamate / Sulfamate Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Industrial Sulfamate / Sulfamate Production,

(2021-2026) & (Tons)

Table 41. China Based Manufacturers Industrial Sulfamate / Sulfamate Production Market Share (2021-2026)

Table 42. Rest of World Based Industrial Sulfamate / Sulfamate Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Industrial Sulfamate / Sulfamate Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Industrial Sulfamate / Sulfamate Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Industrial Sulfamate / Sulfamate Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers Industrial Sulfamate / Sulfamate Production Market Share (2021-2026)

Table 47. World Industrial Sulfamate / Sulfamate Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Industrial Sulfamate / Sulfamate Production by Type (2021-2026) & (Tons)

Table 49. World Industrial Sulfamate / Sulfamate Production by Type (2027-2032) & (Tons)

Table 50. World Industrial Sulfamate / Sulfamate Production Value by Type (2021-2026) & (USD Million)

Table 51. World Industrial Sulfamate / Sulfamate Production Value by Type (2027-2032) & (USD Million)

Table 52. World Industrial Sulfamate / Sulfamate Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World Industrial Sulfamate / Sulfamate Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World Industrial Sulfamate / Sulfamate Production Value by Form, (USD Million), 2021 & 2025 & 2032

Table 55. World Industrial Sulfamate / Sulfamate Production by Form (2021-2026) & (Tons)

Table 56. World Industrial Sulfamate / Sulfamate Production by Form (2027-2032) & (Tons)

Table 57. World Industrial Sulfamate / Sulfamate Production Value by Form (2021-2026) & (USD Million)

Table 58. World Industrial Sulfamate / Sulfamate Production Value by Form (2027-2032) & (USD Million)

Table 59. World Industrial Sulfamate / Sulfamate Average Price by Form (2021-2026) & (US\$/Ton)

Table 60. World Industrial Sulfamate / Sulfamate Average Price by Form (2027-2032) & (US\$/Ton)

Table 61. World Industrial Sulfamate / Sulfamate Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 62. World Industrial Sulfamate / Sulfamate Production by Application (2021-2026) & (Tons)

Table 63. World Industrial Sulfamate / Sulfamate Production by Application (2027-2032) & (Tons)

Table 64. World Industrial Sulfamate / Sulfamate Production Value by Application (2021-2026) & (USD Million)

Table 65. World Industrial Sulfamate / Sulfamate Production Value by Application (2027-2032) & (USD Million)

Table 66. World Industrial Sulfamate / Sulfamate Average Price by Application (2021-2026) & (US\$/Ton)

Table 67. World Industrial Sulfamate / Sulfamate Average Price by Application (2027-2032) & (US\$/Ton)

Table 68. Nippon Chemical Industrial Basic Information, Manufacturing Base and Competitors

Table 69. Nippon Chemical Industrial Major Business

Table 70. Nippon Chemical Industrial Industrial Sulfamate / Sulfamate Product and Services

Table 71. Nippon Chemical Industrial Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 72. Nippon Chemical Industrial Recent Developments/Updates

Table 73. Nippon Chemical Industrial Competitive Strengths & Weaknesses

Table 74. Kanto Chemical Basic Information, Manufacturing Base and Competitors

Table 75. Kanto Chemical Major Business

Table 76. Kanto Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 77. Kanto Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 78. Kanto Chemical Recent Developments/Updates

Table 79. Kanto Chemical Competitive Strengths & Weaknesses

Table 80. Nihon Kagaku Sangyo Basic Information, Manufacturing Base and Competitors

Table 81. Nihon Kagaku Sangyo Major Business

Table 82. Nihon Kagaku Sangyo Industrial Sulfamate / Sulfamate Product and Services

Table 83. Nihon Kagaku Sangyo Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Nihon Kagaku Sangyo Recent Developments/Updates

Table 85. Nihon Kagaku Sangyo Competitive Strengths & Weaknesses

Table 86. Technic Basic Information, Manufacturing Base and Competitors

Table 87. Technic Major Business

Table 88. Technic Industrial Sulfamate / Sulfamate Product and Services

Table 89. Technic Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 90. Technic Recent Developments/Updates

Table 91. Technic Competitive Strengths & Weaknesses

Table 92. Umicore Basic Information, Manufacturing Base and Competitors

Table 93. Umicore Major Business

Table 94. Umicore Industrial Sulfamate / Sulfamate Product and Services

Table 95. Umicore Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 96. Umicore Recent Developments/Updates

Table 97. Umicore Competitive Strengths & Weaknesses

Table 98. BASF Basic Information, Manufacturing Base and Competitors

Table 99. BASF Major Business

Table 100. BASF Industrial Sulfamate / Sulfamate Product and Services

Table 101. BASF Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 102. BASF Recent Developments/Updates

Table 103. BASF Competitive Strengths & Weaknesses

Table 104. Solvay Basic Information, Manufacturing Base and Competitors

Table 105. Solvay Major Business

Table 106. Solvay Industrial Sulfamate / Sulfamate Product and Services

Table 107. Solvay Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 108. Solvay Recent Developments/Updates

Table 109. Solvay Competitive Strengths & Weaknesses

Table 110. Shandong Mingda Chemical Basic Information, Manufacturing Base and Competitors

Table 111. Shandong Mingda Chemical Major Business

Table 112. Shandong Mingda Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 113. Shandong Mingda Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. Shandong Mingda Chemical Recent Developments/Updates

Table 115. Shandong Mingda Chemical Competitive Strengths & Weaknesses

Table 116. Hebei Liuhe Chemical Basic Information, Manufacturing Base and Competitors

Table 117. Hebei Liuhe Chemical Major Business

Table 118. Hebei Liuhe Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 119. Hebei Liuhe Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 120. Hebei Liuhe Chemical Recent Developments/Updates

Table 121. Hebei Liuhe Chemical Competitive Strengths & Weaknesses

Table 122. Shandong Xingda Chemical Basic Information, Manufacturing Base and Competitors

Table 123. Shandong Xingda Chemical Major Business

Table 124. Shandong Xingda Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 125. Shandong Xingda Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 126. Shandong Xingda Chemical Recent Developments/Updates

Table 127. Shandong Xingda Chemical Competitive Strengths & Weaknesses

Table 128. Laizhou Jinxing Chemical Basic Information, Manufacturing Base and Competitors

Table 129. Laizhou Jinxing Chemical Major Business

Table 130. Laizhou Jinxing Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 131. Laizhou Jinxing Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 132. Laizhou Jinxing Chemical Recent Developments/Updates

Table 133. Laizhou Jinxing Chemical Competitive Strengths & Weaknesses

Table 134. Donau Chemie Basic Information, Manufacturing Base and Competitors

- Table 135. Donau Chemie Major Business
- Table 136. Donau Chemie Industrial Sulfamate / Sulfamate Product and Services
- Table 137. Donau Chemie Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 138. Donau Chemie Recent Developments/Updates
- Table 139. Donau Chemie Competitive Strengths & Weaknesses
- Table 140. Raviraj Group Basic Information, Manufacturing Base and Competitors
- Table 141. Raviraj Group Major Business
- Table 142. Raviraj Group Industrial Sulfamate / Sulfamate Product and Services
- Table 143. Raviraj Group Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 144. Raviraj Group Recent Developments/Updates
- Table 145. Raviraj Group Competitive Strengths & Weaknesses
- Table 146. Palm Commodities International Basic Information, Manufacturing Base and Competitors
- Table 147. Palm Commodities International Major Business
- Table 148. Palm Commodities International Industrial Sulfamate / Sulfamate Product and Services
- Table 149. Palm Commodities International Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 150. Palm Commodities International Recent Developments/Updates
- Table 151. Palm Commodities International Competitive Strengths & Weaknesses
- Table 152. Zhangjiagang Huayi Chemical Basic Information, Manufacturing Base and Competitors
- Table 153. Zhangjiagang Huayi Chemical Major Business
- Table 154. Zhangjiagang Huayi Chemical Industrial Sulfamate / Sulfamate Product and Services
- Table 155. Zhangjiagang Huayi Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 156. Zhangjiagang Huayi Chemical Recent Developments/Updates
- Table 157. Zhangjiagang Huayi Chemical Competitive Strengths & Weaknesses
- Table 158. Shanghai Huilong Chemical Basic Information, Manufacturing Base and Competitors
- Table 159. Shanghai Huilong Chemical Major Business
- Table 160. Shanghai Huilong Chemical Industrial Sulfamate / Sulfamate Product and

Services

Table 161. Shanghai Huilong Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 162. Shanghai Huilong Chemical Recent Developments/Updates

Table 163. Shanghai Huilong Chemical Competitive Strengths & Weaknesses

Table 164. Tangshan Sanding Chemical Basic Information, Manufacturing Base and Competitors

Table 165. Tangshan Sanding Chemical Major Business

Table 166. Tangshan Sanding Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 167. Tangshan Sanding Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 168. Tangshan Sanding Chemical Recent Developments/Updates

Table 169. Tangshan Sanding Chemical Competitive Strengths & Weaknesses

Table 170. Hebei Weijia Chemical / Ascendus Chemical Basic Information, Manufacturing Base and Competitors

Table 171. Hebei Weijia Chemical / Ascendus Chemical Major Business

Table 172. Hebei Weijia Chemical / Ascendus Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 173. Hebei Weijia Chemical / Ascendus Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 174. Hebei Weijia Chemical / Ascendus Chemical Recent Developments/Updates

Table 175. Hebei Weijia Chemical / Ascendus Chemical Competitive Strengths & Weaknesses

Table 176. Nile Chemicals Basic Information, Manufacturing Base and Competitors

Table 177. Nile Chemicals Major Business

Table 178. Nile Chemicals Industrial Sulfamate / Sulfamate Product and Services

Table 179. Nile Chemicals Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 180. Nile Chemicals Recent Developments/Updates

Table 181. Nile Chemicals Competitive Strengths & Weaknesses

Table 182. Hebei Quanbaichuan Chemical Basic Information, Manufacturing Base and Competitors

Table 183. Hebei Quanbaichuan Chemical Major Business

Table 184. Hebei Quanbaichuan Chemical Industrial Sulfamate / Sulfamate Product

and Services

Table 185. Hebei Quanbaichuan Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 186. Hebei Quanbaichuan Chemical Recent Developments/Updates

Table 187. Hebei Quanbaichuan Chemical Competitive Strengths & Weaknesses

Table 188. Zunhua Jinchi Chemical Basic Information, Manufacturing Base and Competitors

Table 189. Zunhua Jinchi Chemical Major Business

Table 190. Zunhua Jinchi Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 191. Zunhua Jinchi Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 192. Zunhua Jinchi Chemical Recent Developments/Updates

Table 193. Zunhua Jinchi Chemical Competitive Strengths & Weaknesses

Table 194. Qinhuangdao Tianzi Chemical Basic Information, Manufacturing Base and Competitors

Table 195. Qinhuangdao Tianzi Chemical Major Business

Table 196. Qinhuangdao Tianzi Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 197. Qinhuangdao Tianzi Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 198. Qinhuangdao Tianzi Chemical Recent Developments/Updates

Table 199. Qinhuangdao Tianzi Chemical Competitive Strengths & Weaknesses

Table 200. Qingdao Yuzhou Chemical Basic Information, Manufacturing Base and Competitors

Table 201. Qingdao Yuzhou Chemical Major Business

Table 202. Qingdao Yuzhou Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 203. Qingdao Yuzhou Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 204. Qingdao Yuzhou Chemical Recent Developments/Updates

Table 205. Qingdao Yuzhou Chemical Competitive Strengths & Weaknesses

Table 206. Qingdao Lizhou Chemical Basic Information, Manufacturing Base and Competitors

Table 207. Qingdao Lizhou Chemical Major Business

Table 208. Qingdao Lizhou Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 209. Qingdao Lizhou Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 210. Qingdao Lizhou Chemical Recent Developments/Updates

Table 211. Qingdao Lizhou Chemical Competitive Strengths & Weaknesses

Table 212. Shandong Xinyueyuan New Material Basic Information, Manufacturing Base and Competitors

Table 213. Shandong Xinyueyuan New Material Major Business

Table 214. Shandong Xinyueyuan New Material Industrial Sulfamate / Sulfamate Product and Services

Table 215. Shandong Xinyueyuan New Material Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 216. Shandong Xinyueyuan New Material Recent Developments/Updates

Table 217. Shandong Xinyueyuan New Material Competitive Strengths & Weaknesses

Table 218. Hebei Baisite Basic Information, Manufacturing Base and Competitors

Table 219. Hebei Baisite Major Business

Table 220. Hebei Baisite Industrial Sulfamate / Sulfamate Product and Services

Table 221. Hebei Baisite Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 222. Hebei Baisite Recent Developments/Updates

Table 223. Hebei Baisite Competitive Strengths & Weaknesses

Table 224. Hangzhou Tonghe Chemical Basic Information, Manufacturing Base and Competitors

Table 225. Hangzhou Tonghe Chemical Major Business

Table 226. Hangzhou Tonghe Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 227. Hangzhou Tonghe Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 228. Hangzhou Tonghe Chemical Recent Developments/Updates

Table 229. Hangzhou Tonghe Chemical Competitive Strengths & Weaknesses

Table 230. Hefei TNJ Chemical Basic Information, Manufacturing Base and Competitors

Table 231. Hefei TNJ Chemical Major Business

Table 232. Hefei TNJ Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 233. Hefei TNJ Chemical Industrial Sulfamate / Sulfamate Production (Tons),

Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 234. Hefei TNJ Chemical Recent Developments/Updates

Table 235. Hefei TNJ Chemical Competitive Strengths & Weaknesses

Table 236. Xiamen Zhixin Chemical Basic Information, Manufacturing Base and Competitors

Table 237. Xiamen Zhixin Chemical Major Business

Table 238. Xiamen Zhixin Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 239. Xiamen Zhixin Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 240. Xiamen Zhixin Chemical Recent Developments/Updates

Table 241. Xiamen Zhixin Chemical Competitive Strengths & Weaknesses

Table 242. Huaxing Chemical Basic Information, Manufacturing Base and Competitors

Table 243. Huaxing Chemical Major Business

Table 244. Huaxing Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 245. Huaxing Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 246. Huaxing Chemical Recent Developments/Updates

Table 247. Huaxing Chemical Competitive Strengths & Weaknesses

Table 248. Shandong Xuanzhi Chemical Basic Information, Manufacturing Base and Competitors

Table 249. Shandong Xuanzhi Chemical Major Business

Table 250. Shandong Xuanzhi Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 251. Shandong Xuanzhi Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 252. Shandong Xuanzhi Chemical Recent Developments/Updates

Table 253. Shandong Xuanzhi Chemical Competitive Strengths & Weaknesses

Table 254. Shanghai Jskchem Basic Information, Manufacturing Base and Competitors

Table 255. Shanghai Jskchem Major Business

Table 256. Shanghai Jskchem Industrial Sulfamate / Sulfamate Product and Services

Table 257. Shanghai Jskchem Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 258. Shanghai Jskchem Recent Developments/Updates

Table 259. Shanghai Jskchem Competitive Strengths & Weaknesses

Table 260. Hubei Ruixin Chemical Basic Information, Manufacturing Base and Competitors

Table 261. Hubei Ruixin Chemical Major Business

Table 262. Hubei Ruixin Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 263. Hubei Ruixin Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 264. Hubei Ruixin Chemical Recent Developments/Updates

Table 265. Hubei Ruixin Chemical Competitive Strengths & Weaknesses

Table 266. Hubei Shixing Chemical Basic Information, Manufacturing Base and Competitors

Table 267. Hubei Shixing Chemical Major Business

Table 268. Hubei Shixing Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 269. Hubei Shixing Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 270. Hubei Shixing Chemical Recent Developments/Updates

Table 271. Hubei Shixing Chemical Competitive Strengths & Weaknesses

Table 272. Hubei Ruishengxiang Technology Basic Information, Manufacturing Base and Competitors

Table 273. Hubei Ruishengxiang Technology Major Business

Table 274. Hubei Ruishengxiang Technology Industrial Sulfamate / Sulfamate Product and Services

Table 275. Hubei Ruishengxiang Technology Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 276. Hubei Ruishengxiang Technology Recent Developments/Updates

Table 277. Hubei Ruishengxiang Technology Competitive Strengths & Weaknesses

Table 278. Kishida Chemical Basic Information, Manufacturing Base and Competitors

Table 279. Kishida Chemical Major Business

Table 280. Kishida Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 281. Kishida Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 282. Kishida Chemical Recent Developments/Updates

Table 283. Kishida Chemical Competitive Strengths & Weaknesses

Table 284. Huaian Wansheng Chemical Basic Information, Manufacturing Base and Competitors

Table 285. Huaian Wansheng Chemical Major Business

Table 286. Huaian Wansheng Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 287. Huaian Wansheng Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 288. Huaian Wansheng Chemical Recent Developments/Updates

Table 289. Huaian Wansheng Chemical Competitive Strengths & Weaknesses

Table 290. Jiangsu Dafeng Chemical Basic Information, Manufacturing Base and Competitors

Table 291. Jiangsu Dafeng Chemical Major Business

Table 292. Jiangsu Dafeng Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 293. Jiangsu Dafeng Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 294. Jiangsu Dafeng Chemical Recent Developments/Updates

Table 295. Jiangsu Dafeng Chemical Competitive Strengths & Weaknesses

Table 296. Anhui Ronghui Chemical Basic Information, Manufacturing Base and Competitors

Table 297. Anhui Ronghui Chemical Major Business

Table 298. Anhui Ronghui Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 299. Anhui Ronghui Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 300. Anhui Ronghui Chemical Recent Developments/Updates

Table 301. Anhui Ronghui Chemical Competitive Strengths & Weaknesses

Table 302. Shandong Xuri Chemical Basic Information, Manufacturing Base and Competitors

Table 303. Shandong Xuri Chemical Major Business

Table 304. Shandong Xuri Chemical Industrial Sulfamate / Sulfamate Product and Services

Table 305. Shandong Xuri Chemical Industrial Sulfamate / Sulfamate Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 306. Shandong Xuri Chemical Recent Developments/Updates

Table 307. Shandong Xuri Chemical Competitive Strengths & Weaknesses

Table 308. Global Key Players of Industrial Sulfamate / Sulfamate Upstream (Raw Materials)

Table 309. Global Industrial Sulfamate / Sulfamate Typical Customers

Table 310. Industrial Sulfamate / Sulfamate Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Industrial Sulfamate / Sulfamate Picture

Figure 2. World Industrial Sulfamate / Sulfamate Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Industrial Sulfamate / Sulfamate Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Industrial Sulfamate / Sulfamate Production (2021-2032) & (Tons)

Figure 5. World Industrial Sulfamate / Sulfamate Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Industrial Sulfamate / Sulfamate Production Value Market Share by Region (2021-2032)

Figure 7. World Industrial Sulfamate / Sulfamate Production Market Share by Region (2021-2032)

Figure 8. China Industrial Sulfamate / Sulfamate Production (2021-2032) & (Tons)

Figure 9. Japan Industrial Sulfamate / Sulfamate Production (2021-2032) & (Tons)

Figure 10. Europe Industrial Sulfamate / Sulfamate Production (2021-2032) & (Tons)

Figure 11. North America Industrial Sulfamate / Sulfamate Production (2021-2032) & (Tons)

Figure 12. Industrial Sulfamate / Sulfamate Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Industrial Sulfamate / Sulfamate Consumption (2021-2032) & (Tons)

Figure 15. World Industrial Sulfamate / Sulfamate Consumption Market Share by Region (2021-2032)

Figure 16. United States Industrial Sulfamate / Sulfamate Consumption (2021-2032) & (Tons)

Figure 17. China Industrial Sulfamate / Sulfamate Consumption (2021-2032) & (Tons)

Figure 18. Europe Industrial Sulfamate / Sulfamate Consumption (2021-2032) & (Tons)

Figure 19. Japan Industrial Sulfamate / Sulfamate Consumption (2021-2032) & (Tons)

Figure 20. South Korea Industrial Sulfamate / Sulfamate Consumption (2021-2032) & (Tons)

Figure 21. ASEAN Industrial Sulfamate / Sulfamate Consumption (2021-2032) & (Tons)

Figure 22. India Industrial Sulfamate / Sulfamate Consumption (2021-2032) & (Tons)

Figure 23. Producer Shipments of Industrial Sulfamate / Sulfamate by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Industrial Sulfamate / Sulfamate Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Industrial Sulfamate / Sulfamate Markets in 2025

Figure 26. United States VS China: Industrial Sulfamate / Sulfamate Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Industrial Sulfamate / Sulfamate Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Industrial Sulfamate / Sulfamate Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Industrial Sulfamate / Sulfamate Production Market Share 2025

Figure 30. China Based Manufacturers Industrial Sulfamate / Sulfamate Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Industrial Sulfamate / Sulfamate Production Market Share 2025

Figure 32. World Industrial Sulfamate / Sulfamate Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Industrial Sulfamate / Sulfamate Production Value Market Share by Type in 2025

Figure 34. Ammonium Sulfamate

Figure 35. Sodium Sulfamate

Figure 36. Nickel Sulfamate

Figure 37. Other Metal Sulfamates

Figure 38. World Industrial Sulfamate / Sulfamate Production Market Share by Type (2021-2032)

Figure 39. World Industrial Sulfamate / Sulfamate Production Value Market Share by Type (2021-2032)

Figure 40. World Industrial Sulfamate / Sulfamate Average Price by Type (2021-2032) & (US\$/Ton)

Figure 41. World Industrial Sulfamate / Sulfamate Production Value by Form, (USD Million), 2021 & 2025 & 2032

Figure 42. World Industrial Sulfamate / Sulfamate Production Value Market Share by Form in 2025

Figure 43. Solid - Technical Grade (?95% purity)

Figure 44. Solid - High Purity Grade (?98% purity)

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