

Global Phosphonate Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Phosphonate market size is expected to reach \$ 784 million by 2032, rising at a market growth of 3.2% CAGR during the forecast period (2026-2032).

Phosphonates are a class of organophosphorus compounds that function primarily as chelating agents, scale inhibitors, and corrosion inhibitors. Their molecular structure, which incorporates phosphonic acid groups, allows them to strongly bind with divalent and trivalent metal ions such as calcium, magnesium, and iron, thereby preventing scale formation and metal corrosion in industrial water systems. In 2024, global production of phosphonates reached approximately 528 kilo tons, with an average global market price of around US\$ 1,125 per ton. The most widely used products include HEDP (Hydroxyethylidene diphosphonic acid), ATMP (Aminotris(methylene phosphonic acid)), PBTC (2-Phosphonobutane-1,2,4-tricarboxylic acid), DTPMPA (Diethylenetriamine penta(methylene phosphonic acid)), and PAPEMP (Polyamino polyether methylene phosphonic acid). Historically, HEDP has been the cornerstone of phosphonate applications since the late 1980s, particularly in water treatment, due to its favorable cost-to-performance ratio. While HEDP remains a leading product, other phosphonates with higher efficiency and improved thermal stability, such as PBTC and PAPEMP, have gradually gained prominence in specialized applications.

The supply chain for phosphonates is characterized by a concentrated group of global producers and a broad downstream demand base. Upstream, the main raw materials are phosphorus trichloride, phosphorous acid, amines, and polyols, all derived from the phosphorus chemical industry and subject to cost fluctuations linked to global phosphorus markets. Prominent producers include Aquapharm, Excel Industries, Italmatch Chemicals, Shandong Taihe Water Treatment Technologies, Nantong Uniphos, Qingshuiyuan Technology, and Shandong Kerui Chemicals, many of which

integrate production with R&D to tailor formulations for specific customer needs. On the downstream side, phosphonates are consumed by industries with critical water management requirements. Major end users include water treatment service companies, oilfield operators, power generation plants, chemical and petrochemical complexes, and pulp and paper mills. Buyers often prioritize price, performance under specific conditions, and regulatory compliance. For example, HEDP accounts for 30–40% of total phosphonate consumption in North America, largely because of its cost advantage and versatility. However, purchasing strategies are flexible: if HEDP prices rise significantly, customers may shift to PBTC, ATMP, or dispersant polymers containing HEDP to balance cost and performance. In the oil industry, amino-based phosphonates such as ATMP and DTPMPA are frequently selected to separate oil and water or to operate under high-temperature conditions.

The phosphonate market demonstrates both internal substitution among phosphonate types and external competition with alternative corrosion and scale inhibitors. For decades, HEDP has been the workhorse of the industry, offering reliable performance at a competitive cost. However, market demand is evolving toward higher-performance molecules. PBTC is considered superior to HEDP, and HEDP in turn performs better than ATMP; therefore, in cases of HEDP price increases, PBTC quickly becomes a preferred substitute. PAPEMP and DTPMPA are also increasingly applied in demanding environments such as high-hardness, high-temperature water treatment and oilfield operations. At the same time, phosphonates face growing competition from polycarboxylates, biodegradable polymers, and phosphorus-free inhibitors, especially in regions with stricter regulations on phosphorus discharge. This creates a dual dynamic: stable demand volumes for traditional phosphonates in cost-sensitive markets, and rising opportunities for advanced formulations in performance-driven applications. Regionally, North America and Europe maintain steady consumption with gradual substitution toward PBTC, while Asia-Pacific, led by China, dominates both production and demand due to its large-scale chemical, power, and oilfield industries. Looking ahead, phosphonates are expected to retain their role as core water treatment agents, but the product mix will continue shifting toward more efficient, environmentally compliant alternatives.

This report studies the global Phosphonate production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Phosphonate 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 Phosphonate that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Phosphonate total production and demand, 2021-2032, (K MT)

Global Phosphonate total production value, 2021-2032, (USD Million)

Global Phosphonate production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Phosphonate consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Phosphonate domestic production, consumption, key domestic manufacturers and share

Global Phosphonate production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Phosphonate production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Phosphonate production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Phosphonate 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 Aquapharm, Excel, Italmatch Chemicals, Shandong Taihe Technologies, Nantong Uniphos Chemicals, Henan Qingshuiyuan Tech, Shandong Kairui 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 Phosphonate market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) 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 Phosphonate Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Phosphonate Market, Segmentation by Type:

ATMP

HEDP

EDTMPA

DTPMPA

PBTC

PAPEMP

Others

Global Phosphonate Market, Segmentation by Application:

Power Generation

Oil & Gas

Papermaking

Metal & Mining

Chemical Processing

Others

Companies Profiled:

Aquapharm

Excel

Italmatch Chemicals

Shandong Taihe Technologies

Nantong Uniphos Chemicals

Henan Qingshuiyuan Tech

Shandong Kairui Chemical

Key Questions Answered:

1. How big is the global Phosphonate market?
2. What is the demand of the global Phosphonate market?
3. What is the year over year growth of the global Phosphonate market?
4. What is the production and production value of the global Phosphonate market?
5. Who are the key producers in the global Phosphonate market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 SCADA Introduction
- 1.2 World SCADA Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World SCADA Total Market by Region (by Headquarter Location)
 - 1.3.1 World SCADA Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company SCADA Revenue (2021-2032)
 - 1.3.3 China Based Company SCADA Revenue (2021-2032)
 - 1.3.4 Europe Based Company SCADA Revenue (2021-2032)
 - 1.3.5 Japan Based Company SCADA Revenue (2021-2032)
 - 1.3.6 South Korea Based Company SCADA Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company SCADA Revenue (2021-2032)
 - 1.3.8 India Based Company SCADA Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 SCADA Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

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

3 WORLD SCADA COMPANIES COMPETITIVE ANALYSIS

- 3.1 World SCADA Revenue by Player (2021-2026)
- 3.2 Industry Rank and Concentration Rate (CR)
 - 3.2.1 Global SCADA Industry Rank of Major Players

- 3.2.2 Global Concentration Ratios (CR4) for SCADA in 2025
- 3.2.3 Global Concentration Ratios (CR8) for SCADA in 2025
- 3.3 SCADA Company Evaluation Quadrant
- 3.4 SCADA Market: Overall Company Footprint Analysis
 - 3.4.1 SCADA Market: Region Footprint
 - 3.4.2 SCADA Market: Company Product Type Footprint
 - 3.4.3 SCADA Market: Company Product Application Footprint
- 3.5 Competitive Environment
 - 3.5.1 Historical Structure of the Industry
 - 3.5.2 Barriers of Market Entry
 - 3.5.3 Factors of Competition
- 3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

- 4.1 United States VS China: SCADA Revenue Comparison (by Headquarter Location)
 - 4.1.1 United States VS China: SCADA Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
 - 4.1.2 United States VS China: SCADA Revenue Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States Based Companies VS China Based Companies: SCADA Consumption Value Comparison
 - 4.2.1 United States VS China: SCADA Consumption Value Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: SCADA Consumption Value Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States Based SCADA Companies and Market Share, 2021-2026
 - 4.3.1 United States Based SCADA Companies, Headquarters (States, Country)
 - 4.3.2 United States Based Companies SCADA Revenue, (2021-2026)
- 4.4 China Based Companies SCADA Revenue and Market Share, 2021-2026
 - 4.4.1 China Based SCADA Companies, Company Headquarters (Province, Country)
 - 4.4.2 China Based Companies SCADA Revenue, (2021-2026)
- 4.5 Rest of World Based SCADA Companies and Market Share, 2021-2026
 - 4.5.1 Rest of World Based SCADA Companies, Headquarters (Province, Country)
 - 4.5.2 Rest of World Based Companies SCADA Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World SCADA Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Hardware

5.2.2 Software

5.2.3 Services

5.3 Market Segment by Type

5.3.1 World SCADA Market Size by Type (2021-2026)

5.3.2 World SCADA Market Size by Type (2027-2032)

5.3.3 World SCADA Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY APPLICATION

6.1 World SCADA Market Size Overview by Application: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Application

6.2.1 Power & Energy

6.2.2 Oil & Gas Industry

6.2.3 Water & Waste Control

6.2.4 Telecommunications

6.2.5 Transportation

6.2.6 Manufacturing Industry

6.2.7 Others

6.3 Market Segment by Application

6.3.1 World SCADA Market Size by Application (2021-2026)

6.3.2 World SCADA Market Size by Application (2027-2032)

6.3.3 World SCADA Market Size Market Share by Application (2021-2032)

7 COMPANY PROFILES

7.1 Schneider Electric SE (France)

7.1.1 Schneider Electric SE (France) Details

7.1.2 Schneider Electric SE (France) Major Business

7.1.3 Schneider Electric SE (France) SCADA Product and Services

7.1.4 Schneider Electric SE (France) SCADA Revenue, Gross Margin and Market Share (2021-2026)

7.1.5 Schneider Electric SE (France) Recent Developments/Updates

7.1.6 Schneider Electric SE (France) Competitive Strengths & Weaknesses

7.2 ABB (Switzerland)

7.2.1 ABB (Switzerland) Details

7.2.2 ABB (Switzerland) Major Business

- 7.2.3 ABB (Switzerland) SCADA Product and Services
- 7.2.4 ABB (Switzerland) SCADA Revenue, Gross Margin and Market Share (2021-2026)
- 7.2.5 ABB (Switzerland) Recent Developments/Updates
- 7.2.6 ABB (Switzerland) Competitive Strengths & Weaknesses
- 7.3 Siemens AG (Germany)
 - 7.3.1 Siemens AG (Germany) Details
 - 7.3.2 Siemens AG (Germany) Major Business
 - 7.3.3 Siemens AG (Germany) SCADA Product and Services
 - 7.3.4 Siemens AG (Germany) SCADA Revenue, Gross Margin and Market Share (2021-2026)
 - 7.3.5 Siemens AG (Germany) Recent Developments/Updates
 - 7.3.6 Siemens AG (Germany) Competitive Strengths & Weaknesses
- 7.4 Emerson (US)
 - 7.4.1 Emerson (US) Details
 - 7.4.2 Emerson (US) Major Business
 - 7.4.3 Emerson (US) SCADA Product and Services
 - 7.4.4 Emerson (US) SCADA Revenue, Gross Margin and Market Share (2021-2026)
 - 7.4.5 Emerson (US) Recent Developments/Updates
 - 7.4.6 Emerson (US) Competitive Strengths & Weaknesses
- 7.5 Rockwell Automation Inc. (US)
 - 7.5.1 Rockwell Automation Inc. (US) Details
 - 7.5.2 Rockwell Automation Inc. (US) Major Business
 - 7.5.3 Rockwell Automation Inc. (US) SCADA Product and Services
 - 7.5.4 Rockwell Automation Inc. (US) SCADA Revenue, Gross Margin and Market Share (2021-2026)
 - 7.5.5 Rockwell Automation Inc. (US) Recent Developments/Updates
 - 7.5.6 Rockwell Automation Inc. (US) Competitive Strengths & Weaknesses
- 7.6 Honeywell International Inc. (US)
 - 7.6.1 Honeywell International Inc. (US) Details
 - 7.6.2 Honeywell International Inc. (US) Major Business
 - 7.6.3 Honeywell International Inc. (US) SCADA Product and Services
 - 7.6.4 Honeywell International Inc. (US) SCADA Revenue, Gross Margin and Market Share (2021-2026)
 - 7.6.5 Honeywell International Inc. (US) Recent Developments/Updates
 - 7.6.6 Honeywell International Inc. (US) Competitive Strengths & Weaknesses
- 7.7 Mitsubishi Electric (Japan)
 - 7.7.1 Mitsubishi Electric (Japan) Details
 - 7.7.2 Mitsubishi Electric (Japan) Major Business

- 7.7.3 Mitsubishi Electric (Japan) SCADA Product and Services
- 7.7.4 Mitsubishi Electric (Japan) SCADA Revenue, Gross Margin and Market Share (2021-2026)
- 7.7.5 Mitsubishi Electric (Japan) Recent Developments/Updates
- 7.7.6 Mitsubishi Electric (Japan) Competitive Strengths & Weaknesses
- 7.8 Omron Corporation (Japan)
 - 7.8.1 Omron Corporation (Japan) Details
 - 7.8.2 Omron Corporation (Japan) Major Business
 - 7.8.3 Omron Corporation (Japan) SCADA Product and Services
 - 7.8.4 Omron Corporation (Japan) SCADA Revenue, Gross Margin and Market Share (2021-2026)
 - 7.8.5 Omron Corporation (Japan) Recent Developments/Updates
 - 7.8.6 Omron Corporation (Japan) Competitive Strengths & Weaknesses
- 7.9 General Electric Co. (US)
 - 7.9.1 General Electric Co. (US) Details
 - 7.9.2 General Electric Co. (US) Major Business
 - 7.9.3 General Electric Co. (US) SCADA Product and Services
 - 7.9.4 General Electric Co. (US) SCADA Revenue, Gross Margin and Market Share (2021-2026)
 - 7.9.5 General Electric Co. (US) Recent Developments/Updates
 - 7.9.6 General Electric Co. (US) Competitive Strengths & Weaknesses
- 7.10 Yokogawa Electric Corporation (Japan)
 - 7.10.1 Yokogawa Electric Corporation (Japan) Details
 - 7.10.2 Yokogawa Electric Corporation (Japan) Major Business
 - 7.10.3 Yokogawa Electric Corporation (Japan) SCADA Product and Services
 - 7.10.4 Yokogawa Electric Corporation (Japan) SCADA Revenue, Gross Margin and Market Share (2021-2026)
 - 7.10.5 Yokogawa Electric Corporation (Japan) Recent Developments/Updates
 - 7.10.6 Yokogawa Electric Corporation (Japan) Competitive Strengths & Weaknesses
- 7.11 Larsen & Toubro (India)
 - 7.11.1 Larsen & Toubro (India) Details
 - 7.11.2 Larsen & Toubro (India) Major Business
 - 7.11.3 Larsen & Toubro (India) SCADA Product and Services
 - 7.11.4 Larsen & Toubro (India) SCADA Revenue, Gross Margin and Market Share (2021-2026)
 - 7.11.5 Larsen & Toubro (India) Recent Developments/Updates
 - 7.11.6 Larsen & Toubro (India) Competitive Strengths & Weaknesses
- 7.12 M.B. Control & Systems Pvt. Ltd (India)
 - 7.12.1 M.B. Control & Systems Pvt. Ltd (India) Details

- 7.12.2 M.B. Control & Systems Pvt. Ltd (India) Major Business
- 7.12.3 M.B. Control & Systems Pvt. Ltd (India) SCADA Product and Services
- 7.12.4 M.B. Control & Systems Pvt. Ltd (India) SCADA Revenue, Gross Margin and Market Share (2021-2026)
- 7.12.5 M.B. Control & Systems Pvt. Ltd (India) Recent Developments/Updates
- 7.12.6 M.B. Control & Systems Pvt. Ltd (India) Competitive Strengths & Weaknesses

8 INDUSTRY CHAIN ANALYSIS

- 8.1 SCADA Industry Chain
- 8.2 SCADA Upstream Analysis
- 8.3 SCADA Midstream Analysis
- 8.4 SCADA Downstream Analysis

9 RESEARCH FINDINGS AND CONCLUSION

10 APPENDIX

- 10.1 Methodology
- 10.2 Research Process and Data Source
- 10.3 Disclaimer

List Of Tables

LIST OF TABLES

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

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

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

Table 4. World Phosphonate Production Value Market Share by Region (2021-2026)

Table 5. World Phosphonate Production Value Market Share by Region (2027-2032)

Table 6. World Phosphonate Production by Region (2021-2026) & (K MT)

Table 7. World Phosphonate Production by Region (2027-2032) & (K MT)

Table 8. World Phosphonate Production Market Share by Region (2021-2026)

Table 9. World Phosphonate Production Market Share by Region (2027-2032)

Table 10. World Phosphonate Average Price by Region (2021-2026) & (USD/MT)

Table 11. World Phosphonate Average Price by Region (2027-2032) & (USD/MT)

Table 12. Phosphonate Major Market Trends

Table 13. World Phosphonate Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K MT)

Table 14. World Phosphonate Consumption by Region (2021-2026) & (K MT)

Table 15. World Phosphonate Consumption Forecast by Region (2027-2032) & (K MT)

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

Table 17. Production Value Market Share of Key Phosphonate Producers in 2025

Table 18. World Phosphonate Production by Manufacturer (2021-2026) & (K MT)

Table 19. Production Market Share of Key Phosphonate Producers in 2025

Table 20. World Phosphonate Average Price by Manufacturer (2021-2026) & (USD/MT)

Table 21. Global Phosphonate Company Evaluation Quadrant

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

Table 23. Head Office and Phosphonate Production Site of Key Manufacturer

Table 24. Phosphonate Market: Company Product Type Footprint

Table 25. Phosphonate Market: Company Product Application Footprint

Table 26. Phosphonate Competitive Factors

Table 27. Phosphonate New Entrant and Capacity Expansion Plans

Table 28. Phosphonate Mergers & Acquisitions Activity

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

Table 30. United States VS China Phosphonate Production Comparison, (2021 & 2025

& 2032) & (K MT)

Table 31. United States VS China Phosphonate Consumption Comparison, (2021 & 2025 & 2032) & (K MT)

Table 32. United States Based Phosphonate Manufacturers, Headquarters and Production Site (States, Country)

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

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

Table 35. United States Based Manufacturers Phosphonate Production (2021-2026) & (K MT)

Table 36. United States Based Manufacturers Phosphonate Production Market Share (2021-2026)

Table 37. China Based Phosphonate Manufacturers, Headquarters and Production Site (Province, Country)

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

Table 39. China Based Manufacturers Phosphonate Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Phosphonate Production, (2021-2026) & (K MT)

Table 41. China Based Manufacturers Phosphonate Production Market Share (2021-2026)

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

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

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

Table 45. Rest of World Based Manufacturers Phosphonate Production, (2021-2026) & (K MT)

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

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

Table 48. World Phosphonate Production by Type (2021-2026) & (K MT)

Table 49. World Phosphonate Production by Type (2027-2032) & (K MT)

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

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

Table 52. World Phosphonate Average Price by Type (2021-2026) & (USD/MT)

Table 53. World Phosphonate Average Price by Type (2027-2032) & (USD/MT)

Table 54. World Phosphonate Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 55. World Phosphonate Production by Application (2021-2026) & (K MT)

Table 56. World Phosphonate Production by Application (2027-2032) & (K MT)

Table 57. World Phosphonate Production Value by Application (2021-2026) & (USD Million)

Table 58. World Phosphonate Production Value by Application (2027-2032) & (USD Million)

Table 59. World Phosphonate Average Price by Application (2021-2026) & (USD/MT)

Table 60. World Phosphonate Average Price by Application (2027-2032) & (USD/MT)

Table 61. Aquapharm Basic Information, Manufacturing Base and Competitors

Table 62. Aquapharm Major Business

Table 63. Aquapharm Phosphonate Product and Services

Table 64. Aquapharm Phosphonate Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 65. Aquapharm Recent Developments/Updates

Table 66. Aquapharm Competitive Strengths & Weaknesses

Table 67. Excel Basic Information, Manufacturing Base and Competitors

Table 68. Excel Major Business

Table 69. Excel Phosphonate Product and Services

Table 70. Excel Phosphonate Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 71. Excel Recent Developments/Updates

Table 72. Excel Competitive Strengths & Weaknesses

Table 73. Italmatch Chemicals Basic Information, Manufacturing Base and Competitors

Table 74. Italmatch Chemicals Major Business

Table 75. Italmatch Chemicals Phosphonate Product and Services

Table 76. Italmatch Chemicals Phosphonate Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 77. Italmatch Chemicals Recent Developments/Updates

Table 78. Italmatch Chemicals Competitive Strengths & Weaknesses

Table 79. Shandong Taihe Technologies Basic Information, Manufacturing Base and Competitors

Table 80. Shandong Taihe Technologies Major Business

Table 81. Shandong Taihe Technologies Phosphonate Product and Services

Table 82. Shandong Taihe Technologies Phosphonate Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 83. Shandong Taihe Technologies Recent Developments/Updates
- Table 84. Shandong Taihe Technologies Competitive Strengths & Weaknesses
- Table 85. Nantong Uniphos Chemicals Basic Information, Manufacturing Base and Competitors
- Table 86. Nantong Uniphos Chemicals Major Business
- Table 87. Nantong Uniphos Chemicals Phosphonate Product and Services
- Table 88. Nantong Uniphos Chemicals Phosphonate Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 89. Nantong Uniphos Chemicals Recent Developments/Updates
- Table 90. Nantong Uniphos Chemicals Competitive Strengths & Weaknesses
- Table 91. Henan Qingshuiyuan Tech Basic Information, Manufacturing Base and Competitors
- Table 92. Henan Qingshuiyuan Tech Major Business
- Table 93. Henan Qingshuiyuan Tech Phosphonate Product and Services
- Table 94. Henan Qingshuiyuan Tech Phosphonate Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 95. Henan Qingshuiyuan Tech Recent Developments/Updates
- Table 96. Henan Qingshuiyuan Tech Competitive Strengths & Weaknesses
- Table 97. Shandong Kairui Chemical Basic Information, Manufacturing Base and Competitors
- Table 98. Shandong Kairui Chemical Major Business
- Table 99. Shandong Kairui Chemical Phosphonate Product and Services
- Table 100. Shandong Kairui Chemical Phosphonate Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 101. Shandong Kairui Chemical Recent Developments/Updates
- Table 102. Shandong Kairui Chemical Competitive Strengths & Weaknesses
- Table 103. Global Key Players of Phosphonate Upstream (Raw Materials)
- Table 104. Global Phosphonate Typical Customers
- Table 105. Phosphonate Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Phosphonate Picture

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

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

Figure 4. World Phosphonate Production (2021-2032) & (K MT)

Figure 5. World Phosphonate Average Price (2021-2032) & (USD/MT)

Figure 6. World Phosphonate Production Value Market Share by Region (2021-2032)

Figure 7. World Phosphonate Production Market Share by Region (2021-2032)

Figure 8. India Phosphonate Production (2021-2032) & (K MT)

Figure 9. China Phosphonate Production (2021-2032) & (K MT)

Figure 10. Europe Phosphonate Production (2021-2032) & (K MT)

Figure 11. Phosphonate Market Drivers

Figure 12. Factors Affecting Demand

Figure 13. World Phosphonate Consumption (2021-2032) & (K MT)

Figure 14. World Phosphonate Consumption Market Share by Region (2021-2032)

Figure 15. United States Phosphonate Consumption (2021-2032) & (K MT)

Figure 16. China Phosphonate Consumption (2021-2032) & (K MT)

Figure 17. Europe Phosphonate Consumption (2021-2032) & (K MT)

Figure 18. Japan Phosphonate Consumption (2021-2032) & (K MT)

Figure 19. South Korea Phosphonate Consumption (2021-2032) & (K MT)

Figure 20. ASEAN Phosphonate Consumption (2021-2032) & (K MT)

Figure 21. India Phosphonate Consumption (2021-2032) & (K MT)

Figure 22. Producer Shipments of Phosphonate by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 23. Global Four-firm Concentration Ratios (CR4) for Phosphonate Markets in 2025

Figure 24. Global Four-firm Concentration Ratios (CR8) for Phosphonate Markets in 2025

Figure 25. United States VS China: Phosphonate Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 26. United States VS China: Phosphonate Production Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Phosphonate Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States Based Manufacturers Phosphonate Production Market Share

2025

Figure 29. China Based Manufacturers Phosphonate Production Market Share 2025

Figure 30. Rest of World Based Manufacturers Phosphonate Production Market Share 2025

Figure 31. World Phosphonate Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 32. World Phosphonate Production Value Market Share by Type in 2025

Figure 33. ATMP

Figure 34. HEDP

Figure 35. EDTMPA

Figure 36. DTPMPA

Figure 37. PBTC

Figure 38. PAPEMP

Figure 39. Others

Figure 40. Others

Figure 41. World Phosphonate Production Market Share by Type (2021-2032)

Figure 42. World Phosphonate Production Value Market Share by Type (2021-2032)

Figure 43. World Phosphonate Average Price by Type (2021-2032) & (USD/MT)

Figure 44. World Phosphonate Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 45. World Phosphonate Production Value Market Share by Application in 2025

Figure 46. Power Generation

Figure 47. Oil & Gas

Figure 48. Papermaking

Figure 49. Metal & Mining

Figure 50. Chemical Processing

Figure 51. Others

Figure 52. World Phosphonate Production Market Share by Application (2021-2032)

Figure 53. World Phosphonate Production Value Market Share by Application (2021-2032)

Figure 54. World Phosphonate Average Price by Application (2021-2032) & (USD/MT)

Figure 55. Phosphonate Industry Chain

Figure 56. Phosphonate Procurement Model

Figure 57. Phosphonate Sales Model

Figure 58. Phosphonate Sales Channels, Direct Sales, and Distribution

Figure 59. Methodology

Figure 60. Research Process and Data Source

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