

Chelating Agents Market Report by Type (Aminopolycarboxylic Acid (APCA), Sodium Gluconate, Organophosphonate, and Others), Application (Pulp and Paper, Household and Industrial Cleaning, Water Treatment, Agrochemicals, Personal Care, and Others), and Region 2024-2032

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Abstracts

The global chelating agents market size reached US\$ 6.1 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 8.3 Billion by 2032, exhibiting a growth rate (CAGR) of 3.4% during 2024-2032. The growing awareness about chelation therapy as a medical procedure across the globe, rising environmental concerns among individuals, and the escalating demand in various industrial applications are some of the major factors propelling the market.

Chelating agents, also known as chelators or sequestering agents, are chemical compounds that can control and mitigate the adverse effects of metal ions. They can effectively bind metal contaminants in water and prevent their precipitation or catalytic activity. They can function as both acids and bases and modify the chemical composition of metals to improve the ability to create a bond with other substances. Besides this, they assist in managing heavy metal poisoning and minimizing the toxic effects on the human body.

At present, the rising demand for metal ions and pollution control is contributing to the growth of the market. In line with this, the increasing popularity of urban farming and vertical gardening to prevent nutrient deficiencies and ensure optimal plant growth is strengthening the growth of the market. Apart from this, the growing adoption of chelating agents due to the rising demand for clean energy among individuals around

the world is positively influencing the market. Moreover, the increasing adoption of chelating agents, as they aid in transporting nutrients to plants, is impelling the growth of the market. Besides this, key players are introducing advanced and biodegradable and eco-friendly chelating agents with improved performance and efficiency, which is supporting the growth of the market.

Chelating Agents Market Trends/Drivers:

Rising environmental concerns among the masses

There is a rise in the environmental concerns among the masses due to the increasing pollution level in the environment. Heavy metal pollution is a major environmental issue that creates a threat to ecosystems and human health. Chelating agents assist in addressing this concern by facilitating the remediation and control of heavy metal contamination. In addition, they can form stable complexes with heavy metals and effectively immobilize them and prevent their mobility and bioavailability in the environment. They also aid in reducing the toxicity and potential harm associated with heavy metals. Apart from this, governing agencies of various countries are implementing stringent rules and regulations for heavy metal discharge and pollution control, which is positively influencing the market.

Increasing demand in various industrial applications

There is a rise in the demand for chelating agents in various industrial applications, such as water treatment, metal extraction, and chemical manufacturing. Consumers are increasingly preferring clean water supply for drinking and cleaning activities, which is positively influencing the market. In chemical manufacturing, chelating agents are utilized due to their ability to control metal ion activity. They also aid in optimizing reactions by sequestering metal ions that can act as catalysts or impurities to improve product quality and process efficiency. Apart from this, chelating agents are employed in metal extraction processes to selectively bind and extract metal ions from ores. They also assist in efficient metal recovery and reduce the environmental impact of mining operations.

Growing awareness about chelation therapy

Chelation therapy is a medical procedure that uses chelating agents to remove heavy metals from the body. In addition, the therapy works by forming stable complexes with heavy metal substances and allowing them to be excreted through urine. People suffering from numerous cardiovascular diseases are increasingly preferring chelation

therapy for effective treatment. It is also utilized to treat heavy metal poisoning, such as lead or mercury poisoning, and for certain medical conditions, including iron overload in thalassemia among individuals across the globe. Apart from this, the rapid acceptance of chelation therapy among the masses is offering a positive market outlook.

Chelating Agents Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global chelating agents market report, along with forecasts at the global and regional levels from 2024-2032. Our report has categorized the market based on type and application.

Breakup by Type:

- Aminopolycarboxylic Acid (APCA)
- Sodium Gluconate
- Organophosphonate
- Others

Sodium gluconate represents the largest market share

The report has provided a detailed breakup and analysis of the market based on the type. This includes aminopolycarboxylic acid (APCA), sodium gluconate, organophosphonate, and others. According to the report, sodium gluconate represented the largest segment. Sodium gluconate is a chelating agent derived from gluconic acid and primarily used as a sequestering agent in the construction industry. Additionally, the rising adoption of sodium gluconate, as it aids in enhancing workability, inhibiting corrosion of reinforcement, and improving the strength and durability of concrete structures, is propelling the growth of the market.

Aminopolycarboxylic acid (APCA) chelating agents are widely used in various industries due to their strong chelating properties and versatility. In addition, the rising utilization of APCA in the textile, agriculture, and pharmaceutical industries is contributing to the growth of the market.

Organophosphonate chelating agents, such as amino trimethylene phosphonic acid (ATMP), ethylene diamine tetra (methylene phosphonic acid) (EDTMP), and 1-hydroxyethylidene-1,1-diphosphonic acid (HEDP), offers enhanced sequestering and scale-inhibiting properties. Moreover, the increasing adoption of organophosphonate in industrial cleaning is bolstering the growth of the market.

Breakup by Application:

- Pulp and Paper
- Household and Industrial Cleaning
- Water Treatment
- Agrochemicals
- Personal Care
- Others

Pulp and paper accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the application. This includes pulp and paper, household and industrial cleaning, water treatment, agrochemicals, personal care, and others. According to the report, pulp and paper accounted for the largest market share.

The increasing employment of chelating agents in the pulp and paper sector to remove metal impurities that can affect the quality and brightness of the final paper product is strengthening the growth of the market. Chelating agents also aid in the removal of transition metals, ensure high-quality pulp, and enhance the efficiency of the bleaching process.

The rising utilization of chelating agents in household and industrial cleaning products, such as detergents, is propelling the market growth. In addition, the increasing adoption of chelating agents in household and industrial cleaning to prevent discoloration, degradation, and the formation of precipitates is supporting the growth of the market.

The rising employment of chelating agents in water treatment to control and remove metal ions in water systems is impelling the growth of the market. Furthermore, chelating agents aid in preventing scale formation, reducing corrosion, and removing heavy metals, and ensuring the quality and longevity of water infrastructure.

Breakup by Region:

- Asia Pacific
- North America
- Europe

Latin America
Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest market share

The report has also provided a comprehensive analysis of all the major regional markets, which include Asia Pacific, North America, Europe, Latin America, and the Middle East and Africa. According to the report, Asia Pacific represented the largest market.

Asia Pacific held the biggest market share due to the presence of well-established manufacturing facilities. In addition, the rising number of infrastructure development activities in the region is propelling the growth of the market. Apart from this, governing agencies of the region are encouraging the adoption of chelating agents to reduce environmental pollution, which is contributing to the growth of the market. In line with this, the growing adoption of chelating agents due to the increasing stringent regulations on wastewater treatment is positively influencing the market.

Competitive Landscape:

Key players are introducing new and improved chelating agents with enhanced performance, environmental sustainability, and cost-effectiveness. In line with this, they are adopting sustainable initiatives to develop eco-friendly and biodegradable chelating agents, which aid in reducing water and energy consumption in manufacturing processes. Apart from this, major manufacturers in the industry are producing a wide range of products in different forms, such as liquid, powder, or solid. They utilize chemical synthesis techniques and advanced manufacturing processes to produce high-quality chelating agents in large quantities to fulfil the demand from end industries. In addition, companies are taking several sustainability initiatives and implementing manufacturing practices that minimize the environmental impact.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Akzo Nobel NV
Archer Daniels Midland Company
BASF SE
Kemira Oyj
The DOW Chemical Company

Recent Developments:

In 2020, BASF introduced Neutrol® MGDA, a readily biodegradable chelating agent for personal care applications.

In March 2022, the DOW Chemical Company partnered with Univar Solutions Inc. to deliver portfolio of 13 brands in Brazil. The product portfolio includes Aculyn, Versene, Ecosense, Cellosize, and Foamysense. This agreement will support sustainable and innovative chelating agents for use in range of personal and beauty care products such as shampoos, conditioners, body washes, and others.

Key Questions Answered in This Report

1. What was the size of the global chelating agents market in 2023?
2. What is the expected growth rate of the global chelating agents market during 2024-2032?
3. What are the key factors driving the global chelating agents market?
4. What has been the impact of COVID-19 on the global chelating agents market?
5. What is the breakup of the global chelating agents market based on the type?
6. What is the breakup of the global chelating agents market based on the application?
7. What are the key regions in the global chelating agents market?
8. Who are the key players/companies in the global chelating agents market?

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