

Defoamers Market Report by Medium of Dispersion (Aqueous Systems, Non-Aqueous/Solvent), Product (Water-based, Oil-based, Silicone-based, and Others), Application (Pulp and Paper, Paints and Coatings, Agrochemicals, Water Treatment, Food and Beverages, and Others), and Region 2024-2032

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Abstracts

The global defoamers market size reached US\$ 5.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 7.8 Billion by 2032, exhibiting a growth rate (CAGR) of 3.9% during 2024-2032. Surge in industrialization in developing countries, stringent environmental regulations leading to the technological improvements in defoamers formulations, increased attention to water conservation, expansion of the paper and pulp industry, the escalating product demand in the paint and coating industries, strict manufacturing regulations in the pharmaceutical sector, and stringent regulations of sustainable and biodegradable defoamers are some of the factors propelling the market growth.

Defoamers Market Analysis:

Major Market Drivers: The defoamers market analysis reveals new major factors favoring its growth, such as the continuous innovation in non-silicone choices, which is surging its demand among the industries that typically use silicone products to switch for the alternatives due to different application demand and new regulatory restrictions. The expanding biofuel industry is increasing the product demand, as they require specific process chemicals, which is driving the defoamers market forecast. The defoamers market share is also burgeoned by the growing trend to sustainable production and the rising production of specialty

chemicals. Furthermore, rapid growth of exploration in oil & gas has risen the product demand, as many processes require sophisticated defoaming solutions, which is supporting the defoamers market growth.

Key Market Trends: The defoamers industry trends include the development and improvement of smart defoamers and nanotechnology based defoamers. Moreover, the need for introducing environmentally friendly and sustainable defoamers due to surging environmental awareness is positively influencing the defoamers market research. Another factor supporting the defoamers market outlook is the growing demand for agrochemicals and fertilizers, for which defoamers are extensively used. Besides this, the trend of the Internet of Things (IoT) and artificial intelligence (AI) implementation for manufacturing plants is providing a considerable boost to the defoamers market demand.

Geographical Trends: As per the defoamers market research report, Asia Pacific leads the market due to swift industrialization in India and China. Moreover, the rapid development of pulp and paper, textiles, and water treatment industries is providing a boost to the regional market growth. The commitment of these countries to environmental sustainability and water conservation has further amplified the need for efficient defoaming solutions, bolstering the defoamers market growth.

Competitive Landscape: Some of the major market players in the vaccine adjuvants industry include Air Products and Chemicals Inc., Ashland, BASF SE, Clariant AG, Dow Inc., Elementis plc, Elkem ASA, Evonik Industries AG, Basildon Chemical Company Limited (Momentive Performance Materials Inc.), Kemira Oyj, Wacker Chemie AG., etc.

Challenges and Opportunities: There are several challenges the market is facing like the stringent regulations on medium to high investment in research and development (R&D). But at the same time these obstacles offer opportunities to develop innovative defoaming solutions which are up to date and open new avenues for the market.

Defoamers Market Trends:

Rapid Industrialization Across the Globe

Global industrialization is another essential driver for the defoamers market. The growth of industrial sectors in various countries leads to the natural expansion of manufacturing activities to provide food, textiles, automotive, and other products. Furthermore, defoamers are needed for preventing foam generation during numerous manufacturing processes to avoid product defects, decrease production time, and equipment breakdown. Emerging countries are particularly experiencing rapid industrial growth; thus, the value of new efficient manufacturing approaches is difficult to overestimate.

Stringent Environmental Regulations

Governments and international regulatory bodies are imposing strong environmental standards to minimize environmental harm and facilitate industrial sustainability. Wastewater treatment and emissions, which need defoamers to support minimize the impact of hazardous industrial activities, are common mandates for environmental treatment. The Biden-Harris Administration finalized an even more stringent air quality limit to safeguard the health of America's families, employees, and communities from life-threatening ailments caused by fine particle pollution. The U.S. Environmental Protection Agency's action to strengthen the annual health-based national ambient air quality standard for fine particulate matter 2.5 from 12 micrograms per cubic meter to 9 micrograms per cubic meter will save 4,500 premature deaths, resulting in up to USD 46 billion in net health benefits.

Rising Awareness of Water Conservation

Growing attention to water conservation issues has emphasized the importance of water treatment processes in efficient ways, and one of the valuable solutions is the use of defoamers. Textile and manufacturing industries, as well as internationally orientated pulp and papermaking, put increasing responsibility on those sectors as a phenomenon of water utilization and treatment. According to the UAE Water Security Strategy 2036, the first provides sustainable access to water during both usual and occasional situations. The strategy's purposes are reducing the total demand for water sources by 21 percent, increasing the water productivity index to USD 100 per cubic meter, decreasing the water scarcity index to three degrees, increasing the reuse of treated water up to 95 percent and increasing the national water consumption capacity by 2 days. Ministry of Energy and Infrastructure unveiled the UAE Water Security Strategy 2036 in September 2017. The document's aim is to provide sustainable access to water during ordinary and disaster situations in conjunction with local norms, standards of the World Health Organisation, and vision of achieving happiness and vitality in the UAE.

Defoamers Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on medium of dispersion, product, and application.

Breakup by Medium of Dispersion:

Aqueous Systems

Non-Aqueous/Solvent

The report has provided a detailed breakup and analysis of the market based on the medium of dispersion. This includes aqueous systems and non-aqueous/solvent.

The aqueous systems segment is driven by the increasing emphasis on water-based processes across various industries, aiming to reduce the reliance on volatile organic compounds (VOCs) due to their environmental and health implications. This shift towards water-based systems necessitates the use of defoamers that are compatible with aqueous environments, capable of efficiently reducing or eliminating foam without adversely affecting the system's properties or the final product quality. The trend towards sustainability and stricter environmental regulations further bolsters the demand for aqueous-based defoamers, as industries seek to comply with regulatory standards and reduce their ecological footprint.

On the other hand, the non-aqueous/solvent segment is driven by the specific needs of industries that require solvent-based processes, such as certain types of coatings, adhesives, and oil extraction operations. These applications often involve organic solvents where water-based defoamers are not effective. The demand in this segment is fueled by the efficiency of solvent-based defoamers in suppressing foam under conditions where water is not a viable medium, and their ability to perform in high-temperature and low-water environments. Despite the move towards aqueous systems for environmental reasons, there remains a substantial market for non-aqueous defoamers in applications where their performance characteristics are unmatched.

Breakup by Product:

Water-based

Oil-based

Silicone-based

Others

Silicone-based represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the product. This includes water-based, oil-based, silicone-based, and others. According to the report, silicone-based represented the largest segment.

The silicone-based segment is driven by the increasing demand for high-performance and versatile defoaming solutions across various industries. Silicone-based defoamers are renowned for their exceptional efficacy in controlling foam, even at low concentrations, and their stability over a wide range of temperatures and pH levels. This versatility makes them suitable for diverse applications, from water treatment to food processing, where stringent foam control is essential. Moreover, their compatibility with multiple systems and minimal impact on the end product's quality further bolster their preference among manufacturers seeking efficient, reliable defoaming solutions. This segment's growth is also fueled by ongoing innovations aimed at enhancing environmental sustainability and reducing the ecological footprint of defoaming agents.

Breakup by Application:

Pulp and Paper

Paints and Coatings

Agrochemicals

Water Treatment

Food and Beverages

Others

Pulp and paper represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the application. This includes pulp and paper, paints and coatings, agrochemicals, water treatment, food and beverages, and others. According to the report, pulp and paper represented the largest segment.

The pulp and paper segment is driven by the increasing demand for packaging materials and hygiene products, reflecting global consumer trends and the growth of e-commerce. Enhanced environmental awareness has led to a surge in the use of recycled paper, necessitating the use of defoamers to maintain production quality and efficiency during the recycling process. Technological advancements in paper manufacturing processes also play a crucial role, as they demand sophisticated defoaming solutions to meet the industry's evolving needs. Furthermore, regulatory pressures for sustainable and eco-friendly manufacturing practices push for the development and integration of innovative, environmentally benign defoamers, aligning with the sector's commitment to reducing its ecological footprint.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific leads the market, accounting for the largest defoamers market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report,

Defoamers Market Report by Medium of Dispersion (Aqueous Systems, Non-Aqueous/Solvent), Product (Water-based,...

Asia Pacific represents the largest regional market for defoamers.

The Asia Pacific region is driven by increasing industrialization and urbanization, particularly in emerging economies like China and India, where there's a surge in manufacturing activities across various sectors, including textiles, pharmaceuticals, and automotive. This growth is complemented by a heightened focus on environmental sustainability, leading to stricter wastewater treatment regulations. Additionally, the region's expanding construction sector, fueled by urban development and infrastructure projects, significantly boosts the demand for paints and coatings, where defoamers are crucial in ensuring product quality. These factors collectively propel the defoamers market in the Asia Pacific, positioning it as a key area of growth within the global landscape.

Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the defoamers industry include Air Products and Chemicals Inc., Ashland, BASF SE, Clariant AG, Dow Inc., Elementis plc, Elkem ASA, Evonik Industries AG, Basildon Chemical Company Limited (Momentive Performance Materials Inc.), Kemira Oyj, Wacker Chemie AG, etc.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Key players in the global defoamers market are actively engaging in strategic initiatives to strengthen their positions and cater to the growing demand across diverse industries. These companies are investing heavily in research and development (R&D) to innovate and introduce more effective, environmentally friendly defoamer products that meet stringent regulatory standards and customer expectations for sustainability. Moreover, they are expanding their global footprint through strategic partnerships, mergers and acquisitions, aiming to enhance their distribution networks and penetrate new markets, particularly in emerging economies. These players are also focusing on customizing their product offerings to suit the specific needs of various industries, such as paper and pulp, water treatment, and food and beverages, ensuring high performance and efficiency in foam control.

Defoamers Market News:

In May 2022: Dow Inc. made a significant stride in the coatings industry by launching an innovative line of silicone-based defoamers expressly crafted for water-based industrial coatings. This unveiling marked a pivotal moment in addressing the burgeoning need for advanced additives that can effectively manage foam formation throughout the coating application process. The new silicone-based defoamers from Dow Inc. represent a breakthrough in defoamer technology, offering heightened performance and efficiency compared to conventional options. By leveraging silicone as the primary ingredient, these defoamers demonstrate superior capabilities in controlling foam formation, thereby ensuring smoother coating application and enhanced product quality.

In June 2023: Evonik's Coating Additives business line announced the expansion of its TEGO® Rad range with the introduction of TEGO® Rad 2550, a novel radically crosslinkable defoaming slip additive. This addition to the TEGO® Rad portfolio signifies Evonik's commitment to providing tailored solutions to meet the evolving needs of coating manufacturers, particularly in the realm of UV- and LED-cured formulations. TEGO® Rad 2550 is characterized by several key attributes that distinguish it as a versatile and high-performance additive for coatings.

Key Questions Answered in This Report

1. How big is the global defoamers market?
2. What is the expected growth rate of the global defoamers market during 2024-2032?
3. What are the key factors driving the global defoamers market?
4. What has been the impact of COVID-19 on the global defoamers market?
5. What is the breakup of the global defoamers market based on the product?
6. What is the breakup of the global defoamers market based on the application?

7. What are the key regions in the global defoamers market?
8. Who are the key players/companies in the global defoamers market?

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