

Industrial Anti-Scaling Chemicals Market Report by Type (Polymer-based, Phosphonate-based), End Use Industry (Oil, Gas and Mining, Wastewater Treatment, Food and Beverage, Pulp and Paper, and Others), and Region 2023-2028

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Abstracts

The global industrial anti-scaling chemicals market size reached US\$ 3.43 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 4.76 Billion by 2028, exhibiting a growth rate (CAGR) of 5.6% during 2022-2028. The growing investments in equipment maintenance, rising advancements in chemical formulations, and increasing demand for energy in the residential and commercial sectors for operating various consumer electronics products are some of the major factors propelling the market.

Industrial anti-scaling chemicals are specialized chemical compounds designed to prevent the creation and accumulation of scale deposits on various surfaces in industrial processes. They ensure that industrial equipment maintains its design efficiency, leading to smoother operations and higher productivity. They are used to prevent scaling in boilers, cooling towers, and condensers, ensuring optimal heat transfer efficiency and reducing energy consumption. Industrial anti-scaling chemicals are employed in oil production processes to inhibit scale formation in pipes and downhole equipment, thus maintaining productivity.

At present, the increasing demand for industrial anti-scaling chemicals, as they can help conserve energy and reduce operational costs, is impelling the growth of the market. Besides this, the rising employment of industrial anti-scaling chemicals to prevent scale-related issues leading to unplanned downtime and expensive maintenance is contributing to the growth of the market. In addition, the growing utilization of industrial anti-scaling chemicals in water treatment plants for improving functionalities and reducing maintenance costs is offering a favorable market outlook. Apart from this, the

increasing demand for energy in the residential and commercial sectors for operating various consumer electronics products is supporting the growth of the market. Additionally, the rising employment of industrial anti-scaling chemicals to enhance the service life of reverse osmosis (RO) systems is bolstering the growth of the market.

Industrial Anti-Scaling Chemicals Market Trends/Drivers:

Rising awareness about equipment maintenance

At present, there is an increase in awareness about the importance of equipment maintenance and the need to prevent scale formation in industrial machinery. Industrial anti-scaling chemicals play a crucial role in extending the lifespan of equipment and reducing maintenance costs. Industrial anti-scaling chemicals help to prevent the formation of scale, which can cause severe damage to the equipment, such as clogging, reduced flow rates, decreased heat transfer efficiency, and eventual system failure. Scale build-up also led to increased wear and tear and decreased the lifespan of the equipment. By preventing scale, anti-scaling chemicals can help extend the life of the machinery, resulting in significant cost savings.

Increasing advancements in chemical formulations

At present, the continuous research and development (R&D) activities by chemical manufacturers are leading to the development of more effective and efficient anti-scaling chemical formulations. These advanced formulations offer better performance in preventing scaling and fouling, driving their adoption in various industries. Apart from this, advancements in chemical engineering and nanotechnology are leading to anti-scaling chemicals that are more effective at smaller concentrations, reducing the amount of chemicals needed to prevent scale. Advances in formulation are also leading to more targeted anti-scaling agents, which can prevent the formation of specific types of scale in particular environments. Furthermore, the development of smart industrial anti-scaling agents, which can automatically adjust their activity in response to changes in temperature, pH, or scale-forming ion concentration, is propelling the growth of the market.

Growing focus on reducing water wastage

At present, the growing concerns over water scarcity are prompting industries to adopt water conservation measures. Industrial anti-scaling chemicals help in reducing water wastage by preventing scale formation in water-intensive processes, such as cooling towers and boilers. Anti-scaling chemicals are essential in desalination plants, which convert seawater into fresh water. Scaling is a significant issue in these plants, as the high salt content in seawater increases scale-forming ion concentrations. By preventing scale, anti-scaling chemicals improve the efficiency of desalination plants, allowing more fresh water to be produced from a given volume of seawater. Apart from this, water treatment plants rely on various types of equipment, such as pumps, filters, and membranes, to treat water. Furthermore, as these can become less efficient due to

scale buildup, leading to water wastage, anti-scaling chemicals are used to ensure the optimal operation of the systems for reducing water loss.

Industrial Anti-Scaling Chemicals Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global industrial anti-scaling chemicals market report, along with forecasts at the global, regional and country levels from 2023-2028. Our report has categorized the market based on type and end use industry.

Breakup by Type:

Polymer-based

Phosphonate-based

Polymer-based dominate the market

The report has provided a detailed breakup and analysis of the market based on the type. This includes polymer-based and phosphonate-based. According to the report, polymer-based represented the largest segment.

Polymer-based industrial anti-scaling chemicals are used across various industries to prevent the formation of scale on machinery and equipment. They are used in water treatment plants to prevent scale build-up in pipes, pumps, filters, and membranes. In the oil and gas industry, these chemicals are used to prevent scale in pipelines, heat exchangers, and other equipment. They are also used to treat produced water (water that is brought to the surface during oil and gas extraction), which often contains high concentrations of scale-forming ions. Moreover, in desalination plants, which convert seawater into freshwater, anti-scaling chemicals are utilized to prevent scale build-up on membranes and other equipment. This is particularly important as seawater often contains high concentrations of scale-forming ions.

Breakup by End Use Industry:

Oil, Gas and Mining

Wastewater Treatment

Food and Beverage

Pulp and Paper

Others

Wastewater treatment holds the largest share of the market

A detailed breakup and analysis of the market based on the end-user industry have also been provided in the report. This includes oil, gas, and mining, wastewater treatment, food and beverage, pulp and paper, and others. According to the report, wastewater treatment accounted for the largest market share.

Wastewater treatment facilities handle water from various sources, including domestic sewage, industrial wastewater, and stormwater runoff. These waters can contain high concentrations of scale-forming ions, such as calcium, magnesium, and silica. If left untreated, these ions can precipitate out of the water and form hard mineral scales on

the surfaces of pipes, pumps, and other equipment. Anti-scaling chemicals are added to the water as it enters the treatment facility to prevent scales from forming in the pipes and pumps that move the water through the facility. Wastewater is often treated and reused, particularly in regions with water scarcity. However, the treated water can still contain scale-forming ions. Anti-scaling chemicals enable safe and efficient water reuse by preventing scale in the systems that use the treated water.

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 exhibits a clear dominance, accounting for the largest industrial anti-scaling chemicals 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); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, Others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, Others); Latin America (Brazil, Mexico, Others); and the Middle East and Africa. According to the report, Asia Pacific represented the largest market segment.

Asia Pacific held the biggest market share due to the rising focus on conducting proper wastewater treatments and preventing water pollution. Besides this, the increasing implantation of stringent regulations by governing agencies in the region to protect the environment and public health is propelling the growth of the market.

Apart from this, rising initiatives taken by industries to conduct wastewater management before releasing water from factories containing various harmful chemicals into natural water bodies are contributing to the growth of the market.

Asia Pacific is estimated to expand further in this domain due to the rising environmental awareness among the masses. Besides this, the increasing development of efficient anti-scaling chemicals is strengthening the growth of the market.

Competitive Landscape:

Key market players are developing more effective, environmentally friendly, and cost-efficient anti-scaling chemicals that cater to diverse industrial applications. They are also offering customized solutions to meet the unique scaling challenges of different industries. Top companies are increasingly adopting sustainability initiatives, such as developing and promoting eco-friendly products, reducing their carbon footprint, and adopting greener manufacturing processes. They are also embracing digital technologies and data analytics to enhance product development, supply chain management, and customer service. Leading companies are educating customers about the importance of anti-scaling chemicals, providing technical support, and offering training programs to enhance customer satisfaction and build long-term relationships. 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 N.V.

American Water Chemicals Inc.

Ashland Global Holdings Inc.

Avista Technologies Inc. (Kurita Water Industries Ltd.)

BASF SE

BWA Water Additives US LLC (Italmatch Chemicals S.p.A.)

Clariant AG

Dow Inc.

Innovative Chemical Technologies Inc.

Kemira Oyj

Solvay S.A.

Recent Developments:

In August 2020, Kurita Water Industries Ltd. announced that it is collaborating with Fracta to launch a joint digital transformation development project for water treatment, artificial intelligence, and Internet of Things (IoT) products.

In October 2022, Italmatch Chemicals Advanced Water Solutions launched Lumiclene®, a new brand of Smart-Tagged Polymers for Industrial Water Treatment. Lumiclene® is designed to provide superior dispersing and scale inhibition capabilities while allowing online monitoring and control of the polymer in the water.

In 2023, Kemira acquired SimAnalytics, an advanced process optimization start-up, to strengthen its services offering. The collaboration between the two companies has resulted in a digital service called Kemira KemConnect Harmonizer, which helps paper and board mills improve production efficiency. With the acquisition, Kemira aims to expand this service offering to its water treatment customers as well.

Key Questions Answered in This Report

1. How big is the global industrial anti-scaling chemicals market?
2. What is the expected growth rate of the global industrial anti-scaling chemicals market during 2023-2028?
3. What are the key factors driving the global industrial anti-scaling chemicals market?
4. What has been the impact of COVID-19 on the global industrial anti-scaling chemicals market?
5. What is the breakup of the global industrial anti-scaling chemicals market based on the type?
6. What is the breakup of the global industrial anti-scaling chemicals market based on the end use industry?
7. What are the key regions in the global industrial anti-scaling chemicals market?
8. Who are the key players/companies in the global industrial anti-scaling chemicals market?

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