

# Global Sodium Carbonate (Soda Ash) Market - Forecasts from 2020 to 2025

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## Abstracts

The global sodium carbonate (soda ash) market is projected to surge at a CAGR of 0.61% growing from USD13.349 billion in 2019 to attain USD13.848 billion by the end of 2025.

Soda Ash or sodium carbonate is utilized as an essential raw material in the manufacturing of glass, soaps and detergents, chemical industry, and various other industrial applications. The market is projected to grow owing to the growing construction industry with varied investments in infrastructure projects worldwide. In the United States, the chemical is among the most widely utilized and important products that contribute to the country's GDP. It is for this reason; the Federal Reserve Board incorporates the monthly soda ash production data into the monthly economic indicators for monitoring the condition of the U.S. economy. The market, on the basis of type, is categorized into dense soda ash and light soda ash. The current novel coronavirus infection scenario is projected to cause a negative impact on the market growth due to the decline in sodium carbonate demand, in particular, in the glass manufacturing to be applied for construction and automotive applications.

The extensive utilization of soda ash in soaps and detergent industry is further augmenting the market demand during the forecast period. The use of sodium carbonate in animal feed is fueling the market demand in the forecast period with the growing demand for animal as food and animal-derived products globally. One of the major reasons is the growing global population driving the global demand for food. The utilization of soda ash in the chemical processing industry is further propagating the market growth during the forecast period. On the basis of geography, the global sodium carbonate market is segmented into five regions, namely, North America, South America, Europe, Middle East and Africa, and the Asia Pacific. The Asia Pacific region

is accounted to hold a substantial market share with China having a significant market share in the global total.

The use of sodium carbonate in soaps and detergents sector is offering strong market growth prospects during the forecast period.

Soda ash is used in laundry and cleaning compound formulations for the enhancement of cleansing properties. For example, as a builder in the emulsification of oil stains. It is used in the reduction of dirt deposition at the time of washing and rinsing and for providing alkalinity for cleaning and for softening of laundry water. Also, the chemical is a component of another major builder in detergent formulations, sodium tripolyphosphate (STPP). Furthermore, soda ash is utilized for the manufacturing of ultramarine for providing white clothes a sparkling look. Apart from industrial cleaning, sodium carbonate is used in household cleaning products. It is used as an important raw material for producing percarbonates, silicates, and phosphates.

The growing household spending on cleaning supplies is further propelling the market growth during the forecast period. Additionally, soaps form a part of personal care products are further providing an impetus in propagating the market demand during the forecast period. For example, as per the U.S. Bureau of Labor Statistics, the average annual expenditure on personal care products and services grew from USD762 in 2017 to USD786 in 2019. Shampoos also make use of sodium carbonate as a pH modifier. Hence, the growing personal care industry worldwide will further offer strong market growth opportunities in the form of application in soaps and shampoos during the forecast period. Big companies such as Ciner Group, headquartered in Istanbul offer soda ash for utilization in day-to-day cleaning products. The detergent industry make use of medium, dense or lighter grade of the company's soda ash for the creation of various commonly used household products that are found in laundry room, kitchen, and bathroom. These products range from soaking powders to dish soap, also known and washing soda. The company offers soda ash that is superior in quality and eco-friendly.

The presence of companies producing soda ash is providing an opportunity for the market to grow worldwide, further strengthening their footprint in different regions during the forecast period.

Tata Chemicals Ltd. offers soda ash products across different regions of the world, namely Asia, North America, Europe, Magadi, South Africa, and Singapore. In the Asian region, the company offers product variants as light soda ash and dense soda ash. For

North American region, the company offers product variants as dense soda ash, natural light soda ash, and synthetic light soda ash. For European region, soda ash is offered as heavy soda ash and industrial grade soda ash. Magadi soda ash is basically a natural soda ash utilized mainly in the glass industry. This is due to the fact that the chemical holds suitability for the manufacturing of bottles, jars, container glass, figured glass and flat glass.

Other areas of application include the use of soda ash in glass formulation where soda acts in the form of a fluxing agent by breaking the Si-O bonds of silica, resulting in the reduction of viscosity of the melt and lowering of the temperature required for glass formation. It is further used in the manufacturing of sodium silicate and other sodium compounds, for the production of sodium chromate where chromium compounds are utilized in numerous applications that include preservatives in wood and leather catalysts, pigments and chrome plating. Other applications include soaps, detergents, rayon, manufacturing soda crystals, water softening, pulp and paper industry for the preparation of pulping liquors, steel and metallurgical industries, caustic liquor manufacture, and textile, dyes, and bleaching industries, also in scouring cotton and wool. For the South African region, the company offers high purity soda ash (HP), crushed refined soda (CRS), and standard ash Magadi (SAM).

Ciech Group offers soda ash light, soda ash dense, soda ash feed grade, soda ash dense coarse grade, and soda ash dense compacted grade.

Ingram Group, in 2019 announced a major investment in natural soda production in the United States as a part of its strategy for pursuing sustainable growth and high performance. The company took step for the production of 2.5 million tons of sodium carbonate and 200 thousand tons of sodium bicarbonate in Wyoming (USA) in a collaborative agreement with Ciner Group having a significant know-how in the natural soda production. The facility investment is scheduled for completion by 2024. The company is poised to be among the top five players globally in soda ash production after the facility is in full operation.

Sequens, headquartered in Clermont-Ferrand, Auvergne-Rhône-Alpes, France, is a leader in soda ash production. The potential applications include pharmaceuticals, home care, and glass industry.

Bashkir Soda Company is the one of the largest companies in manufacturing varied chemical products in Russia, CIS, and other regions of the world. The company was found as a result of merger between Soda JSC and Kaustik OJSC. The company

manufactures the following products namely, caustic soda and chlorine, organochlorine products, soda ash, purified sodium bicarbonate, polyvinylchloride resins, polyvinylchloride resins, calcium chloride, and white carbon.

The growing animal feed industry with increasing meat production worldwide will continue to provide an opportunity in augmenting the market demand during the forecast period.

Sodium carbonate is used as source of sodium in compound feeds. Additionally, the chemical is used in the form of pH buffer for the regulation of gastric and intestinal acid-base balance. Manufacturers provide appropriate soda ash granulation for ensuring uniform distribution of all the nutrients. It is estimated by the United Nations Food and Agricultural Organization, FAO that the world will require to produce over 60% of food by the end of 2050 for satiating the global food demand as per the rapidly growing global population. Hence, it is believed that animal protein production will increase more with meat production including poultry, swine, and beef, increasing by two-folds. In addition, dairy and fish production is predicted to grow to almost three times by the end of 2050. With the estimated meat production growth, the demand for compound feed will definitely continue to increase in order to provide all the necessary nutrients to the farm animals, further propagating the market demand during the forecast period.

As per OECD-FAO agricultural outlook 2019-2028, world meat production soared by 1% to a volume of 327 Mt in 2018. This is further reflecting growth in bovine production, pig, and poultry meats. Also, modest gains have been achieved in sheep meat production. The meat production in the world surged in Australia, the EU, Russia, and the USA, to a certain extent, in Argentina, India, and Mexico. The output increase is further credited to improvements in productivity. In certain cases, specifically, Australia and the EU, the higher rate of drought-induced slaughter is a factor. Furthermore, it is predicted that with the growth in income, the per capita meat consumption will rise to 35.1 kg retail weight equivalent, r.w.e, by the end of 2028. An increase of 0.4 kg retail weight equivalent in comparison to the base period.

In light of continued income growth, global meat consumption per capita is projected to increase to 35.1 kg retail weight equivalent (r.w.e.) by 2028, an increase of 0.4 kg r.w.e. or 1.2% compared to the base period.

Segmentation:

By Type

Dense Soda Ash

Light Soda Ash

By Application

Glass

Soaps & Detergents

Chemicals

Others

By Geography

North America

USA

Canada

Mexico

South America

Brazil

Argentina

Others

Europe

UK

Germany

France

Poland

Others

Middle East and Africa

UAE

Israel

Saudi Arabia

Others

Asia Pacific

Japan

China

India

Australia

Others

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