

Global Industrial Sulfamate / Sulfamate Market Growth 2026-2032

<https://marketpublishers.com/r/GD15F1A78C70EN.html>

Date: July 2026

Pages: 219

Price: US\$ 3,660.00 (Single User License)

ID: GD15F1A78C70EN

Abstracts

The global Industrial Sulfamate / Sulfamate market size is predicted to grow from US\$ 264 million in 2025 to US\$ 587 million in 2032; it is expected to grow at a CAGR of 10.5% from 2026 to 2032.

Industrial sulfamates / sulfamates refer to a class of inorganic chemical salts with the sulfamate anion (H_2NSO_3^-), produced by neutralizing sulfamic acid ($\text{NH}_2\text{SO}_3\text{H}$) with various cations. Key varieties include ammonium sulfamate ($\text{NH}_4\text{SO}_3\text{NH}_2$), used as a low-toxicity herbicide, flame retardant for paper/textiles, and nitrous oxide generator in agriculture, firefighting and tobacco processing; sodium sulfamate (NaH_2NSO_3), serving as an electroplating additive (nickel plating brightener) and metal surface cleaner with scale/rust removal efficiency far superior to hydrochloric acid, and also used in wastewater treatment and textile printing auxiliaries; nickel sulfamate ($\text{Ni}(\text{H}_2\text{NSO}_3)_2 \cdot x\text{H}_2\text{O}$), a primary electroplating salt that delivers extremely low internal stress in deposited coatings, making it essential for PCB plating and precision electroforming in aerospace and automotive components. With their low corrosivity, environmental compatibility and multi-scene adaptability, industrial sulfamates offer irreplaceable technological value in metal surface treatment, industrial cleaning, electroplating, flame-retardant materials and agricultural chemicals, representing a widely used industrial salt system in the fine chemical sector.

Industrial sulfamates are fine chemical salts based on the sulfamate anion, converting the weak acidity, thermal stability and metal-complexing ability of sulfamic acid into industrially usable salt forms. The three mainstream varieties – nickel sulfamate, sodium sulfamate and ammonium sulfamate – dominate three distinct downstream markets: low-stress electroforming, environmentally friendly cleaning and intumescent flame retardancy. On pricing, industrial-grade sodium sulfamate trades at USD

800?1,200/ton, ammonium sulfamate at USD 1,000?1,500/ton, while high?purity electronic?grade nickel sulfamate concentrate (500?600 g/L) reaches USD 5,000?8,000/ton. Gross margins diverge sharply: commodity sodium/ammonium salts achieve only 15?20% under intense competition, whereas producers mastering high?purity nickel sulfamate crystallization and impurity control (Nippon Chemical Industrial, Atotech/MKS) enjoy 35?45% margins with strong customer lock?in. Downstream primary applications: electroplating & electroforming (PCBs, semiconductor lead frames, automotive/aerospace parts) consumes about 50% of the total sulfamate value, with nickel sulfamate contributing the vast majority of that segment; metal cleaning & surface treatment accounts for ~25% (sodium sulfamate replacing hydrochloric/sulfuric acid for descaling boilers and heat exchangers); flame retardants ~15% (ammonium sulfamate for halogen?free treatment of paper, textiles and polyurethane foams); agricultural herbicides and others ~10%. Incremental demand is driven by three trends: (1) AI servers and advanced packaging boosting high?end PCB and substrate nickel plating; (2) tightening environmental regulations driving substitution of sulfamate for strong acids in industrial cleaning; (3) lightweight EV components (Al/Mg alloys) and integrated die?casting mould electroforming requiring low?stress nickel deposits. Landscape: Japanese players (Nippon Chemical Industrial, Nikko Metal) maintain a generational lead in high?purity nickel sulfamate crystallization and bath formulations; Atotech (MKS) and MacDermid Enthone capture high?end customer channels through complete electroplating line solutions; BASF, Solvay and other integrated giants hold sulfamic acid raw material capacity but invest limitedly in fine salts; Chinese producers (Shandong Haihua, Hubei Xinrund, Jiangsu Jiafeng) have cost advantages in mass production of sodium/ammonium sulfamates, but still lag in batch?to?batch stability and impurity control for electronic?grade nickel sulfamate, so the high?end market remains import?dependent. Uncertainties include: raw material price/availability of dicyandiamide (key intermediate for sulfamic acid); nickel price (LME) volatility directly impacting nickel sulfamate cost and buyers? willingness; and potential PFAS regulations affecting sulfamate?based surfactants. Conclusion: Industrial sulfamates represent a fine?chemical sector with both commodity and specialty segments. Sodium/ammonium salts are mature and price?competitive, while high?purity nickel sulfamate is in early?to?mid growth, where technical barriers and lengthy customer qualification create a strong moat. Over the next five years, high?end electronics plating and green cleaning substitution will be the major volume/value drivers, and companies that combine upstream sulfamic acid integration with consistent impurity control in electronic?grade nickel salt will capture the highest value in the chain.

LP Information, Inc. (LPI) ' newest research report, the ?Industrial Sulfamate / Sulfamate Industry Forecast? looks at past sales and reviews total world Industrial

Sulfamate / Sulfamate sales in 2025, providing a comprehensive analysis by region and market sector of projected Industrial Sulfamate / Sulfamate sales for 2026 through 2032. With Industrial Sulfamate / Sulfamate sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Industrial Sulfamate / Sulfamate industry.

This Insight Report provides a comprehensive analysis of the global Industrial Sulfamate / Sulfamate landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Industrial Sulfamate / Sulfamate portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Industrial Sulfamate / Sulfamate market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Industrial Sulfamate / Sulfamate and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Industrial Sulfamate / Sulfamate.

This report presents a comprehensive overview, market shares, and growth opportunities of Industrial Sulfamate / Sulfamate market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Ammonium Sulfamate

Sodium Sulfamate

Nickel Sulfamate

Other Metal Sulfamates

Segmentation by Form:

Solid - Technical Grade (?95% purity)

Solid - High Purity Grade (?98% purity)

Concentrated Solution - Electronic Grade (metal ions

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