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Liquid Sodium Silicate Market Assessment, By Purity [Less than 98%, 98% to 99%, More than 99%], By Packaging Type [Drums, Bottles, Intermediate Bulk Container (IBC), Others], By Application [Cleaning Products, Paper Production, Construction Products, Food Preservatives, Water & Wastewater Treatment Plants, Metal Casting, Oil & Gas Drilling Process, Others], By End-use Industry [Pulp & Paper, Building and Construction, Food, Metallurgy, Oil & Gas, Others] By Region, Opportunities and Forecast, 2017-2031F

https://marketpublishers.com/r/LB9F9D35B15AEN.html
Date: March 2025
Pages: 214
Price: US$ 4,500.00 (Single User License)
ID: LB9F9D35B15AEN

Abstracts

Global liquid sodium silicate market is projected to witness a CAGR of 4.4% during the forecast period 2024-2031, growing from 575.4 kilotons in 2023 to 812.03 kilotons in 2031. Asia-Pacific will have a dominant share in the global liquid sodium silicate market in 2022 due to the increasing detergent production activities. According to the recent report published by the Chemicals and Petrochemicals Manufacturers' Association (CPMA), the production of synthetic detergent intermediates in India was 733.2 thousand tons in 2020-21 and 780 thousand tons in 2021-22, representing a year-on-year growth rate of 6.0%.

The recently inaugurated wastewater treatment plants are spurring the demand for liquid sodium silicate. For illustration, in September 2022, LANXESS, a chemical products manufacturer with a global presence, launched a USD 12.65 million wastewater treatment plant in Belgium. The wastewater treatment plant has a

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processing capacity of 260,000 liters per hour.

The increase in production activities related to cleaning products is mainly favoring market growth. This can be attributed to several factors, including increasing consumer demand, technological advancements, shifting consumer preferences, and growing health and wellness awareness. Thus, the increase in the production of cleaning products is boosting the demand for liquid sodium silicate to enhance the cleaning efficiency of products. The increasing emphasis on replacing the aging infrastructure, rising development of residential complexes, surging investments in commercial construction projects, and technological innovations are some of the major elements contributing to the growth of the building & construction industry. Hence, the increase in construction activities is fueling the adoption of cement, adhesives & sealants, and fillers, thereby fostering the growth of the liquid sodium silicate market.

Additionally, the stringent regulatory norms for wastewater treatment, the development of new plants for water treatment, and growing awareness about the need for water conservation and reuse are proliferating the development of new wastewater and water treatment projects. This, in turn, will create a favorable potential for the liquid sodium silicate market growth. For instance, the Waitsfield, Vermont Wastewater Treatment Plant in the United States, is in the design phase and aims to construct water distribution lines to serve failing infrastructure elements. The plan is to begin construction in 2024. However, the stringent regulatory norms for the manufacturing of liquid sodium silicate are restraining the market growth.

Increasing Adoption of Liquid Sodium Silicate in Cleaning Products

The liquid sodium silicate solution is ideal in the composition of cleaning products, such as detergents and soaps, to prevent the emulsion of fats and organic oils, corrosion, alkalization, reduce the calcium, and minimize magnesium hardness. Furthermore, the deployment of liquid sodium silicate in cleaning products acts as an alkaline buffer, thereby ensuring the superior consistency and strength of the cleaning product against low and high acidic agents. The rising disposable income, growing awareness of the health benefits of a clean environment, increasing health consciousness, and rapid urbanization are some of the key trends accelerating the growth in the production of cleaning products.

For instance, according to the recent data published by the International Association for Soaps, Detergents and Maintenance Products (A.I.S.E.), a European Union cleaning products association, in 2021, the cleaning products industry in the European region

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was valued at USD 34.0 billion and in 2022, it was USD 35.9 billion, showcasing a year-on-year growth rate of 5.2%. Likewise, the industrial cleaning sector in Europe was valued at USD 7.4 billion in 2021 and USD 9.2 billion in 2022, an annual growth rate of 19.1% as opposed to the year 2021. Therefore, the increase in the production of cleaning products is fueling the utilization of liquid sodium silicate to control viscosity, thereby propelling the market growth.

The Booming Building and Construction Activities is Amplifying the Market Growth

Liquid sodium silicate is an important material in the construction industry, particularly for producing concrete as a self-healing agent to improve the structure's durability and strength. Additionally, liquid sodium silicate is used on concrete floors to harden them, leading to dust-free concrete floors and to shield previous building elements from the damaging effects of moisture. The increase in the development of new construction projects is ascribed to prominent determinants, such as increasing infrastructure development for airports, new office building development, increasing investment in residential houses in developing economies, and rising renovation activities.

For example, according to the recent statistics published by the Construction Products Association, a global association for the construction industry, the global construction industry registered a year-on-year growth rate of 2.8% in 2022. Furthermore, according to Statistics Canada, an official government of Canada website, Canada residential construction registered a monthly growth of 1.6%, reaching USD 11.9 billion in August 2023. Also, according to the recent statistics published in the 2023 European Construction Industry Federation (FIEC) report, the investments in European Union housebuilding projects were valued at USD 576,826.5 million in 2022, showcasing an annual growth rate of 2.2%. Henceforth, the rise in building and construction activities is spurring the demand for liquid sodium silicate, which, in turn, is boosting the market growth.

Beneficial Technical Properties of Liquid Sodium Silicate is Boosting the Market Growth

The key technical properties associated with liquid sodium silicate include a molecular weight of 140.08, density of 1.37 g/mL, melting point at 0°C, boiling point at 100°C, pH of 11-12.5 (20°C), and refractive index of 1.42. Thus, liquid sodium silicate is a viscous liquid that is deployed in a wide variety of applications, including as a deflocculant in casting slips, a cement for producing cardboard, a drilling fluid to stabilize borehole walls, and an adhesive for glass or porcelain. It is also used in powdered laundry and dishwasher detergents, as it aids in removing fats and oils, neutralizing acids, and

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breaking starches and proteins.

The recent innovations in cleaning products range are creating a lucrative opportunity for the liquid sodium silicate industry growth. For instance, in February 2023, Ecolab, a leading manufacturer of cleaning products at the global level, unveiled Ecolab Scientific Clean, the latest range of consumer retail product lines ideal for application in residential, industrial, and commercial facilities. The primary focus of the products is to ensure high-quality sanitization. Hence, the significant technical properties associated with liquid sodium silicate are fostering their adoption across a wide range of end-use industries, further augmenting the market growth.

The Revenue Advancement of Various End-use Industries in the Asia-Pacific Region

The Asia-Pacific region is experiencing substantial construction activities, driven by urbanization, infrastructure development, and population growth, which has increased demand for liquid sodium silicate in the construction industry. Furthermore, the demand for professional cleaning services is increasing in Asia-Pacific since consumers are becoming highly concerned about cleanliness and hygiene. As a result, the end-use industries, such as building & construction and cleaning products, are registering growth in the Asia-Pacific region.

For instance, China's 14th Five-Year Plan focuses on energy efficiency, green building development, and urban renewal, with estimates of overall investment in new infrastructure during the 14th Five-Year Plan period (2021-2025). These developments indicate China's commitment to and investment in the commercial space and construction industries by 2025. As a result, the growth of the various end-use industries in the Asia-Pacific is driving the growth of the liquid sodium silicate market in the region.

Impact of COVID-19

The COVID-19 pandemic in 2020 resulted in revenue losses for various end-use industries, such as building and construction, oil and gas, and pulp, as the production activities were halted, the supply chain was disrupted, and there was a workforce shortage. The decline in the revenue growth of the above end-use industries resulted in losses for the liquid sodium silicate.

However, the demand for cleaning products was exponentially high as the need for hygiene products increased in 2020. For instance, according to the International

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Association for Soaps, Detergents and Maintenance Products (A.I.S.E.), in 2020, the European cleaning products industry registered an annual growth rate of 4.7% compared to 2019. Hence, the sudden surge in the sales of cleaning products due to the COVID-19 pandemic accelerated the market growth.

Impact of Russia-Ukraine War

The Russia-Ukraine war led to sanctions and supply chain disruptions, increased prices and product shortages, and environmental damage. These factors resulted in several major players exiting their business operations in Russia.

In March 2022, Procter & Gamble (P&G) announced the reduction of its product portfolio in the Russian market, focusing only on basic health, hygiene, and personal care items. The company also stated that it was ending all new capital investments in Russia and 'significantly reducing' its portfolio to prioritize these essential products.

Key Players Landscape and Outlook

The competitive rivalry in the global liquid sodium silicate is increasing due to the presence of various prominent players such as Nippon Chemical Industrial CO., LTD, Kiran Global Chem Limited., C THAI GROUP, HINDCON CHEMICALS LIMITED, Occidental Chemical Corporation, PQ Corporation, Silmaco., CIECH Group, Ch. Rudniki S.A., and ANKIT SILICATE. The global liquid sodium silicate industry is witnessing numerous product launches and acquisitions, with the main objective being to increase profitability.

In June 2023, PQ Corporation announced the acquisition of a specialty silicate and engineered materials business from Solvay. This acquisition expanded PQ Corporation's portfolio of specialty silicates and strengthened its position in the global market.

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