

# **Ethyleneamines Market by Type (Ethylenediamine, Diethylenetriamine, Triethylenetetramine), Application, End Use (Resin, Paper, Automotive, Adhesive, Water Treatment, Agriculture, Pharmaceutical), and Region - Global Forecasts to 2028**

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## **Abstracts**

The global ethyleneamines market size is projected to grow from USD 2.3 billion in 2023 to USD 2.9 billion, at a CAGR of 4.7%. The ethyleneamines market is currently experiencing robust growth and dynamic shifts in response to evolving industrial demands and applications. Ethyleneamines, known for their unique blend of reactivity, basicity, and surface activity, have become integral intermediates in the production of essential products across various industries. This expansion is being propelled by factors such as increased industrialization, urbanization, and the growing need for advanced chemical solutions.

These versatile compounds find application in numerous sectors, including agrochemicals, pharmaceuticals, water treatment, and resin manufacturing. Their significance lies in serving as intermediates in the creation of functional products that drive modern industrial processes. In particular, their role in chelating agents, exemplified by ethylenediaminetetraacetic acid (EDTA) production, underscores their importance in complex chemical processes.

The triethylenetetramine segment is expected to register one of the highest market share during the forecast period

Triethylenetetramine is a mixture of four TETA ethyleneamines with close boiling points including linear, branched, and two cyclic molecules. The major applications of TETA include epoxy curing agents and the production of polyamides and oil and fuel additives.

TETA has similar activity and uses to ethylenediamine and diethylenetriamine. TETA finds use as a crosslinker (hardener) in epoxy curing, as an intermediate in the synthesis of cellulose chemicals and paper auxiliaries, and in lube oil and fuel additives.

The chelating agents segment in application is expected to register one of the highest CAGR during the forecast period

Polyaminocarboxylic acids and their salts derived from ethyleneamines play a pivotal role in a diverse array of applications where specific metal ions pose challenges in processing or necessitate buffering, concentrating, separating, or transporting. These compounds, commonly known as chelating agents or chelants, function by forming stoichiometric complexes with a wide range of divalent or polyvalent metals.

One of the notable industrial applications of ethylenediamine (EDA), an ethyleneamine derivative, is its integral role in the production of ethylenediaminetetraacetic acid (EDTA). EDTA is a well-established chelating agent renowned for its efficacy in metal ion complexation. Industrial processes for manufacturing EDTA typically involve the addition of formaldehyde and hydrogen cyanide, or an alkali metal cyanide, to an aqueous solution of EDA. This chemical transformation results in the creation of EDTA.

Europe ethyleneamines market is estimated to capture one of the highest share in terms of volume during the forecast period

Europe has the greatest market for ethyleneamines. The European Union (EU) chemical industry presents an intricate landscape characterized by both challenges and opportunities. In terms of volume, EU chemical production reached 271 million tonnes in 2020, while consumption, which includes net imports and production, stood at 289 million tonnes. Interestingly, this volume-based production fell by 10% in the period from 2004 to 2020, in contrast to the global trend of industry expansion. One key factor contributing to this decline is the relatively high energy costs in Europe, which have impacted the industry's competitiveness when compared to regions benefiting from more favorable energy prices. Despite this, the total value of EU chemical sales demonstrated significant growth, increasing by 38% from Euro 363 billion in 2000 to Euro 499 billion in 2020.

Looking ahead, the global chemical production is poised for a remarkable expansion, with expectations to double from 2017 to 2030, driven by the rising demand for chemicals across various downstream industries. Anticipated world chemical sales in 2030 are projected to reach Euro 6.2 trillion. In this evolving landscape, the EU-27

chemical industry is expected to hold a prominent position, ranking third globally in terms of sales volumes.

The break-up of the profile of primary participants in the ethyleneamines market:

By Company Type: Tier 1 – 46%, Tier 2 – 43%, and Tier 3 – 27%

By Designation: C Level – 21%, D Level – 23%, and Others – 56%

By Region: North America – 37%, Europe – 23%, Asia Pacific– 26%, Middle East & Africa – 10%, and South America – 4%

The key companies profiled in this report are Huntsman Corporation (US), Dow Inc (US), Tosoh Corporation (Japan), Nouryon (Netherlands), BASF SE (Germany), Diamines and Chemicals Ltd (India), SABIC (Saudi Arabia), Balaji Speciality Chemicals Limited (India), Oriental Union Chemical Corporation (Taiwan), Kanto Chemical Co., Inc (Japan), and others.

Research Coverage:

The ethyleneamines market is segmented by Type (Ethylenediamine, Diethylenetriamine, Triethylenetetramine & Others Higher Ethyleneamines), Application (Chelating Agents, and Others), End Use (Chelating Agents, Corrosion Inhibitors, Lube Oil & Fuel Additives, Processing Aids/Additives, Textile Additives, Curing Agents, and Others), End Use (Resin, Paper, Adhesive, Automotive, Water Treatment, Agro Chemicals, Pharmaceuticals, Personal Care, Textile Chemicals, and Others), and Region (North America, Europe, Asia Pacific, the Middle East & Africa, and South America). The study's coverage covers detailed information on the key factors influencing the growth of the ethyleneamines market, such as drivers, constraints, challenges, and opportunities. A thorough examination of the top industry players was carried out in order to provide insights into their company overview, solutions, and services; essential strategies; contracts, partnerships, and agreements. There includes coverage of new product and service launches, mergers and acquisitions, and ongoing developments in the ethyleneamines market. A competitive analysis of emerging companies in the ethyleneamines business ecosystem is included in this study. Reasons to buy this report: The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall ethyleneamines market and the subsegments. This report will help stakeholders

understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Growing demand for ethyleneamines in emerging economies), restraints (volatility in raw material prices), opportunities (collaboration of distributors in untapped markets), and challenges (stringent regulatory policies).

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the ethyleneamines market

Market Development: Comprehensive information about lucrative markets – the report analyses the ethyleneamines market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the ethyleneamines market

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Huntsman Corporation (US), Dow Inc (US), Tosoh Corporation (Japan), Nouryon (Netherlands), BASF SE (Germany). The report also helps stakeholders understand the pulse of the ethyleneamines market and provides them information on key market drivers, restraints, challenges, and opportunities.

## Contents

### 1 INTRODUCTION

#### 1.1 STUDY OBJECTIVES

#### 1.2 MARKET DEFINITION

##### 1.2.1 INCLUSIONS AND EXCLUSIONS

##### 1.2.2 DEFINITION AND INCLUSIONS, BY TYPE

##### 1.2.3 DEFINITION AND INCLUSIONS, BY APPLICATION

##### 1.2.4 DEFINITION AND INCLUSIONS, BY END USE

#### 1.3 STUDY SCOPE

#### FIGURE 1 ETHYLENEAMINES MARKET SEGMENTATION

##### 1.3.1 REGIONS COVERED

##### 1.3.2 YEARS CONSIDERED

#### 1.4 CURRENCY CONSIDERED

#### 1.5 UNITS CONSIDERED

#### 1.6 STAKEHOLDERS

#### 1.7 SUMMARY OF CHANGES

### 2 RESEARCH METHODOLOGY

#### 2.1 RESEARCH DATA

#### FIGURE 2 ETHYLENEAMINES MARKET: RESEARCH DESIGN

##### 2.1.1 SECONDARY DATA

###### 2.1.1.1 Key data from secondary sources

##### 2.1.2 PRIMARY DATA

###### 2.1.2.1 Key data from primary sources

###### 2.1.2.2 Breakdown of primary interviews

#### FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEWS

###### 2.1.2.3 Primary data sources

###### 2.1.2.4 Key industry insights

#### 2.2 MARKET SIZE ESTIMATION

##### 2.2.1 BOTTOM-UP APPROACH

#### FIGURE 4 MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH

##### 2.2.2 TOP-DOWN APPROACH

#### FIGURE 5 MARKET SIZE ESTIMATION: TOP-DOWN APPROACH

#### FIGURE 6 ETHYLENEAMINES MARKET SIZE ESTIMATION, BY REGION

#### FIGURE 7 ETHYLENEAMINES MARKET SIZE ESTIMATION, BY TYPE

#### 2.3 MARKET FORECAST

### 2.3.1 SUPPLY-SIDE FORECAST

FIGURE 8 ETHYLENEAMINES MARKET: SUPPLY-SIDE FORECAST

FIGURE 9 METHODOLOGY FOR SUPPLY-SIDE SIZING OF ETHYLENEAMINES MARKET

### 2.4 FACTOR ANALYSIS

FIGURE 10 GLOBAL IMPACT ON ETHYLENEAMINES MARKET

### 2.5 DATA TRIANGULATION

FIGURE 11 ETHYLENEAMINES MARKET: DATA TRIANGULATION

### 2.6 ASSUMPTIONS

### 2.7 LIMITATIONS

### 2.8 GROWTH RATE ASSUMPTIONS

### 2.9 RISK ASSESSMENT

TABLE 1 ETHYLENEAMINES MARKET: RISK ASSESSMENT

### 2.10 RECESSION IMPACT

## 3 EXECUTIVE SUMMARY

TABLE 2 ETHYLENEAMINES MARKET SNAPSHOT

FIGURE 12 ETHYLENEDIAMINE TO DOMINATE MARKET DURING FORECAST PERIOD

FIGURE 13 CURING AGENTS TO ACCOUNT FOR LARGEST SHARE DURING FORECAST PERIOD

FIGURE 14 RESIN TO BE FASTEST-GROWING END USE DURING FORECAST PERIOD

FIGURE 15 ASIA PACIFIC TO DOMINATE MARKET DURING FORECAST PERIOD

## 4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN ETHYLENEAMINES MARKET

FIGURE 16 EMERGING ECONOMIES OFFER LUCRATIVE GROWTH POTENTIAL FOR ETHYLENEAMINE MARKET PLAYERS

4.2 ETHYLENEAMINES MARKET, BY TYPE

FIGURE 17 ETHYLENEDIAMINE TO LEAD MARKET DURING FORECAST PERIOD

4.3 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY TYPE AND COUNTRY

FIGURE 18 ETHYLENEDIAMINE TYPE SEGMENT AND CHINA ACCOUNTED FOR HIGHEST GROWTH IN 2022

4.4 ETHYLENEAMINES MARKET, DEVELOPED VS. EMERGING ECONOMIES

FIGURE 19 MARKET IN EMERGING ECONOMIES TO GROW FASTER THAN DEVELOPED COUNTRIES

#### 4.5 ETHYLENEAMINES MARKET, BY KEY COUNTRY

FIGURE 20 INDIA TO RECORD HIGHEST GROWTH DURING FORECAST PERIOD

### 5 MARKET OVERVIEW

#### 5.1 INTRODUCTION

#### 5.2 PHYSICAL PROPERTIES

#### 5.3 KEY EMERGING ECONOMIES VS. EU 27 AND US

FIGURE 21 AVERAGE CHEMICAL PRODUCTION GROWTH PER ANNUM  
(2011–2021)

#### 5.4 MARKET DYNAMICS

FIGURE 22 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN  
ETHYLENEAMINES MARKET

##### 5.4.1 DRIVERS

5.4.1.1 Use of lube oil additives and curing agents in automotive sector

5.4.1.2 Wide application of ethyleneamines in end-use industries

5.4.1.3 Growth of agriculture and fishing sector in emerging economies

##### 5.4.2 RESTRAINTS

5.4.2.1 Slow economic growth and supply chain disruptions

##### 5.4.3 OPPORTUNITIES

5.4.3.1 Supply chain optimization and strategic collaborations

5.4.3.2 Environmental regulations and specialty applications

##### 5.4.4 CHALLENGES

5.4.4.1 Raw material price volatility and safety imperatives

#### 5.5 PORTER'S FIVE FORCES ANALYSIS

TABLE 3 ETHYLENEAMINES MARKET: PORTER'S FIVE FORCES ANALYSIS

FIGURE 23 PORTER'S FIVE FORCES ANALYSIS: ETHYLENEAMINES MARKET

##### 5.5.1 THREAT OF NEW ENTRANTS

##### 5.5.2 THREAT OF SUBSTITUTES

##### 5.5.3 BARGAINING POWER OF BUYERS

##### 5.5.4 BARGAINING POWER OF SUPPLIERS

##### 5.5.5 INTENSITY OF COMPETITIVE RIVALRY

#### 5.6 MACROECONOMIC INDICATORS

##### 5.6.1 INTRODUCTION

##### 5.6.2 GDP TRENDS AND FORECAST

TABLE 4 GDP TRENDS AND FORECAST, PERCENTAGE CHANGE, 2020–2027

##### 5.6.3 TRENDS AND FORECAST OF GLOBAL CONSTRUCTION INDUSTRY

##### 5.6.4 TRENDS IN AUTOMOTIVE INDUSTRY

TABLE 5 AUTOMOTIVE INDUSTRY PRODUCTION (2021–2022)



## 6 INDUSTRY TRENDS

### 6.1 SUPPLY CHAIN ANALYSIS

FIGURE 24 ETHYLENEAMINES MARKET: SUPPLY CHAIN ANALYSIS

### 6.2 TRENDS AND DISRUPTIONS IMPACTING CUSTOMER BUSINESS

FIGURE 25 TRENDS IN END-USE INDUSTRIES IMPACTING BUSINESS OF ETHYLENEAMINES MANUFACTURERS

### 6.3 ECOSYSTEM MAPPING

TABLE 6 ETHYLENEAMINES MARKET: SUPPLY CHAIN ANALYSIS

FIGURE 26 ETHYLENEAMINES MARKET: ECOSYSTEM MAP

### 6.4 CASE STUDY ANALYSIS

### 6.5 TECHNOLOGY ANALYSIS

### 6.6 KEY STAKEHOLDERS AND BUYING CRITERIA

#### 6.6.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 27 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS

TABLE 7 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP TWO END USERS (%)

#### 6.6.2 BUYING CRITERIA

FIGURE 28 KEY BUYING CRITERIA FOR ETHYLENEAMINES

TABLE 8 KEY BUYING CRITERIA FOR ETHYLENEAMINES

### 6.7 PRICING ANALYSIS

FIGURE 29 AVERAGE SELLING PRICE TREND, BY REGION, 2022

FIGURE 30 AVERAGE SELLING PRICE TREND, BY TYPE, 2022

FIGURE 31 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY TYPE, 2023

### 6.8 TRADE ANALYSIS

#### 6.8.1 EXPORT SCENARIO OF ETHYLENE

TABLE 9 COUNTRY-WISE EXPORT DATA FOR ETHYLENE, 2020–2022 (USD THOUSAND)

#### 6.8.2 IMPORT SCENARIO OF ETHYLENE

TABLE 10 COUNTRY-WISE IMPORT DATA FOR ETHYLENE, 2020–2022 (USD THOUSAND)

#### 6.8.3 EXPORT SCENARIO OF ETHYLENEDIAMINE

TABLE 11 COUNTRY-WISE EXPORT DATA FOR ETHYLENEDIAMINE, 2020–2022 (USD THOUSAND)

#### 6.8.4 IMPORT SCENARIO OF ETHYLENEDIAMINE

TABLE 12 COUNTRY-WISE IMPORT DATA FOR ETHYLENEDIAMINE, 2020–2022 (USD THOUSAND)

### 6.9 GLOBAL ECONOMIC SCENARIO AFFECTING MARKET GROWTH



### 6.9.1 RUSSIA–UKRAINE WAR

### 6.9.2 CHINA

#### 6.9.2.1 China's debt problem

#### 6.9.2.2 Australia–China trade war

#### 6.9.2.3 Environmental commitments

### 6.9.3 EUROPE

#### 6.9.3.1 Energy crisis in Europe

## 6.10 TARIFF AND REGULATORY LANDSCAPE

### 6.10.1 REGULATIONS

### 6.10.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 13 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 14 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 15 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

### 6.11 KEY CONFERENCES AND EVENTS, 2023–2024

TABLE 16 ETHYLENEAMINES MARKET: KEY CONFERENCES AND EVENTS, 2023–2024

### 6.12 PATENT ANALYSIS

#### 6.12.1 METHODOLOGY

#### 6.12.2 PUBLICATION TRENDS

FIGURE 32 PATENTS PUBLISHED, 2018–2023

#### 6.12.3 JURISDICTION ANALYSIS

FIGURE 33 PATENTS PUBLISHED BY JURISDICTION, 2018–2023

#### 6.12.4 TOP APPLICANTS

FIGURE 34 PATENTS PUBLISHED BY MAJOR APPLICANTS, 2018–2023

TABLE 17 TOP PATENT OWNERS

## 7 ETHYLENEAMINES MARKET, BY TYPE

### 7.1 INTRODUCTION

FIGURE 35 ETHYLENEDIAMINE TO LEAD ETHYLENEAMINES MARKET DURING FORECAST PERIOD

TABLE 18 ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 19 ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 20 ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 21 ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

## 7.2 ETHYLENEDIAMINE

### 7.2.1 WIDE USE IN INDUSTRIAL APPLICATIONS TO DRIVE MARKET

TABLE 22 ETHYLENEDIAMINE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 23 ETHYLENEDIAMINE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 24 ETHYLENEDIAMINE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 25 ETHYLENEDIAMINE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

## 7.3 DIETHYLENETRIAMINE

### 7.3.1 HIGH VERSATILITY AND CHEMICAL REACTIVITY TO FUEL MARKET

TABLE 26 DIETHYLENETRIAMINE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 27 DIETHYLENETRIAMINE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 28 DIETHYLENETRIAMINE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 29 DIETHYLENETRIAMINE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

## 7.4 TRIETHYLENETETRAMINE

### 7.4.1 INCREASING DEMAND FROM AUTOMOTIVE AND ELECTRONICS SECTOR TO DRIVE MARKET

TABLE 30 TRIETHYLENETETRAMINE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 31 TRIETHYLENETETRAMINE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 32 TRIETHYLENETETRAMINE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 33 TRIETHYLENETETRAMINE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

## 7.5 OTHER TYPES

TABLE 34 OTHER HIGHER ETHYLENEAMINES: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 35 OTHER HIGHER ETHYLENEAMINES: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 36 OTHER HIGHER ETHYLENEAMINES: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 37 OTHER HIGHER ETHYLENEAMINES: ETHYLENEAMINES MARKET, BY

REGION, 2023–2028 (KILOTON)

## **8 ETHYLENEAMINES MARKET, BY APPLICATION**

### **8.1 INTRODUCTION**

FIGURE 36 CURING AGENTS APPLICATION TO LEAD MARKET DURING FORECAST PERIOD

TABLE 38 ETHYLENEAMINES MARKET, BY APPLICATION, 2021–2022 (USD MILLION)

TABLE 39 ETHYLENEAMINES MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 40 ETHYLENEAMINES MARKET, BY APPLICATION, 2021–2022 (KILOTON)

TABLE 41 ETHYLENEAMINES MARKET, BY APPLICATION, 2023–2028 (KILOTON)

### **8.2 CHELATING AGENTS**

#### **8.2.1 EFFECTIVE METAL ION BINDING TO DRIVE MARKET**

TABLE 42 CHELATING AGENTS: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 43 CHELATING AGENTS: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 44 CHELATING AGENTS: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 45 CHELATING AGENTS: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

### **8.3 CORROSION INHIBITORS**

#### **8.3.1 INHIBITORY AND CORROSIVE PROPERTIES TO BOOST MARKET**

TABLE 46 CORROSION INHIBITORS: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 47 CORROSION INHIBITORS: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 48 CORROSION INHIBITORS: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 49 CORROSION INHIBITORS: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

### **8.4 LUBE OIL & FUEL ADDITIVES**

#### **8.4.1 APPLICATION IN MULTIFARIOUS INDUSTRIES TO DRIVE MARKET**

TABLE 50 LUBE OIL & FUEL ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 51 LUBE OIL & FUEL ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 52 LUBE OIL & FUEL ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 53 LUBE OIL & FUEL ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

#### 8.5 PROCESSING AIDS/ADDITIVES

##### 8.5.1 HUGE DEMAND IN EMERGING COUNTRIES TO DRIVE MARKET

TABLE 54 PROCESSING AIDS/ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 55 PROCESSING AIDS/ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 56 PROCESSING AIDS/ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 57 PROCESSING AIDS/ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

#### 8.6 TEXTILE ADDITIVES

##### 8.6.1 RISING DEMAND IN TEXTILE INDUSTRY TO PROPEL MARKET

TABLE 58 TEXTILE ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 59 TEXTILE ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 60 TEXTILE ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 61 TEXTILE ADDITIVES: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

#### 8.7 CURING AGENTS

8.7.1 PROMINENT USE IN MULTIFARIOUS END-USE INDUSTRY TO BOOST MARKET

TABLE 62 CURING AGENTS: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 63 CURING AGENTS: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 64 CURING AGENTS: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 65 CURING AGENTS: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

#### 8.8 OTHER APPLICATIONS

TABLE 66 OTHER APPLICATIONS: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 67 OTHER APPLICATIONS: ETHYLENEAMINES MARKET, BY REGION,

2023–2028 (USD MILLION)

TABLE 68 OTHER APPLICATIONS: ETHYLENEAMINES MARKET, BY REGION,  
2021–2022 (KILOTON)

TABLE 69 OTHER APPLICATIONS: ETHYLENEAMINES MARKET, BY REGION,  
2023–2028 (KILOTON)

## **9 ETHYLENEAMINES MARKET, BY END USE**

### **9.1 INTRODUCTION**

FIGURE 37 RESIN SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

TABLE 70 ETHYLENEAMINES MARKET, BY END USE, 2021–2022 (USD MILLION)

TABLE 71 ETHYLENEAMINES MARKET, BY END USE, 2023–2028 (USD MILLION)

TABLE 72 ETHYLENEAMINES MARKET, BY END USE, 2021–2022 (KILOTON)

TABLE 73 ETHYLENEAMINES MARKET, BY END USE, 2023–2028 (KILOTON)

### **9.2 RESIN**

9.2.1 TECHNOLOGICAL ADVANCEMENTS AND WIDE INDUSTRIAL  
APPLICATIONS TO DRIVE MARKET

TABLE 74 RESIN: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD  
MILLION)

TABLE 75 RESIN: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD  
MILLION)

TABLE 76 RESIN: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 77 RESIN: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

### **9.3 PAPER**

9.3.1 PRODUCTION OF HIGH-QUALITY AND VERSATILE PAPER PRODUCTS TO  
DRIVE MARKET

TABLE 78 PAPER: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD  
MILLION)

TABLE 79 PAPER: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD  
MILLION)

TABLE 80 PAPER: ETHYLENEAMINES MARKET, BY REGION, 2021–2022  
(KILOTON)

TABLE 81 PAPER: ETHYLENEAMINES MARKET, BY REGION, 2023–2028  
(KILOTON)

### **9.4 ADHESIVE**

9.4.1 GROWTH OF MANUFACTURING INDUSTRIES TO BOOST MARKET

TABLE 82 ADHESIVE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD  
MILLION)

TABLE 83 ADHESIVE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD

MILLION)

TABLE 84 ADHESIVE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022  
(KILOTON)

TABLE 85 ADHESIVE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028  
(KILOTON)

## 9.5 AUTOMOTIVE

9.5.1 ECONOMIC GROWTH AND INVESTMENT IN ADVANCED MATERIALS TO  
DRIVE MARKET

TABLE 86 AUTOMOTIVE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022  
(USD MILLION)

TABLE 87 AUTOMOTIVE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028  
(USD MILLION)

TABLE 88 AUTOMOTIVE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022  
(KILOTON)

TABLE 89 AUTOMOTIVE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028  
(KILOTON)

## 9.6 WATER TREATMENT

9.6.1 WATER QUALITY MONITORING AND GROWING CONCERNS TO FUEL  
MARKET

TABLE 90 WATER TREATMENT: ETHYLENEAMINES MARKET, BY REGION,  
2021–2022 (USD MILLION)

TABLE 91 WATER TREATMENT: ETHYLENEAMINES MARKET, BY REGION,  
2023–2028 (USD MILLION)

TABLE 92 WATER TREATMENT: ETHYLENEAMINES MARKET, BY REGION,  
2021–2022 (KILOTON)

TABLE 93 WATER TREATMENT: ETHYLENEAMINES MARKET, BY REGION,  
2023–2028 (KILOTON)

## 9.7 AGRO CHEMICALS

9.7.1 MODERN FARMING PRACTICES TO BOOST DEMAND FOR  
ETHYLENEBISDITHIOCARBAMATE

TABLE 94 AGRO CHEMICALS: ETHYLENEAMINES MARKET, BY REGION,  
2021–2022 (USD MILLION)

TABLE 95 AGRO CHEMICALS: ETHYLENEAMINES MARKET, BY REGION,  
2023–2028 (USD MILLION)

TABLE 96 AGRO CHEMICALS: ETHYLENEAMINES MARKET, BY REGION,  
2021–2022 (KILOTON)

TABLE 97 AGRO CHEMICALS: ETHYLENEAMINES MARKET, BY REGION,  
2023–2028 (KILOTON)

## 9.8 PHARMACEUTICAL

### 9.8.1 HIGH INVESTMENT IN RESEARCH AND DEVELOPMENT TO DRIVE MARKET

TABLE 98 PHARMACEUTICAL: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 99 PHARMACEUTICAL: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 100 PHARMACEUTICAL: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 101 PHARMACEUTICAL: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

### 9.9 PERSONAL CARE

#### 9.9.1 DIVERSE CONSUMER NEEDS AND INNOVATION TO DRIVE MARKET

TABLE 102 PERSONAL CARE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 103 PERSONAL CARE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 104 PERSONAL CARE: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 105 PERSONAL CARE: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

### 9.10 TEXTILE CHEMICALS

#### 9.10.1 GROWTH OF TEXTILE AND APPAREL SECTOR TO PROPEL MARKET

TABLE 106 TEXTILE CHEMICALS: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 107 TEXTILE CHEMICALS: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 108 TEXTILE CHEMICALS: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 109 TEXTILE CHEMICALS: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

### 9.11 OTHER END USES

TABLE 110 OTHER END USES: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 111 OTHER END USES: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 112 OTHER END USES: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 113 OTHER END USES: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)



TABLE 114 OIL & PETROLEUM: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 115 OIL & PETROLEUM: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 116 OIL & PETROLEUM: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 117 OIL & PETROLEUM: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

TABLE 118 MINERAL & METAL PROCESSING: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 119 MINERAL & METAL PROCESSING: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 120 MINERAL & METAL PROCESSING: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 121 MINERAL & METAL PROCESSING: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

TABLE 122 OTHERS: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 123 OTHERS: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 124 OTHERS: ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 125 OTHERS: ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

## **10 ETHYLENEAMINES MARKET, BY REGION**

### **10.1 INTRODUCTION**

FIGURE 38 ASIA PACIFIC TO REGISTER HIGHEST CAGR BETWEEN 2023 AND 2028

TABLE 126 ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (USD MILLION)

TABLE 127 ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 128 ETHYLENEAMINES MARKET, BY REGION, 2021–2022 (KILOTON)

TABLE 129 ETHYLENEAMINES MARKET, BY REGION, 2023–2028 (KILOTON)

### **10.2 EUROPE**

#### **10.2.1 RECESSION IMPACT ON EUROPE**

FIGURE 39 EUROPE: ETHYLENEAMINES MARKET SNAPSHOT

TABLE 130 EUROPE: ETHYLENEAMINES MARKET, BY COUNTRY, 2021–2022 (USD MILLION)

TABLE 131 EUROPE: ETHYLENEAMINES MARKET, BY COUNTRY, 2023–2028  
(USD MILLION)

TABLE 132 EUROPE: ETHYLENEAMINES MARKET, BY COUNTRY, 2021–2022  
(KILOTON)

TABLE 133 EUROPE: ETHYLENEAMINES MARKET, BY COUNTRY, 2023–2028  
(KILOTON)

TABLE 134 EUROPE: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD  
MILLION)

TABLE 135 EUROPE: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD  
MILLION)

TABLE 136 EUROPE: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022  
(KILOTON)

TABLE 137 EUROPE: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028  
(KILOTON)

TABLE 138 EUROPE: ETHYLENEAMINES MARKET, BY APPLICATION, 2021–2022  
(USD MILLION)

TABLE 139 EUROPE: ETHYLENEAMINES MARKET, BY APPLICATION, 2023–2028  
(USD MILLION)

TABLE 140 EUROPE: ETHYLENEAMINES MARKET, BY APPLICATION, 2021–2022  
(KILOTON)

TABLE 141 EUROPE: ETHYLENEAMINES MARKET, BY APPLICATION, 2023–2028  
(KILOTON)

TABLE 142 EUROPE: ETHYLENEAMINES MARKET, BY END USE, 2021–2022 (USD  
MILLION)

TABLE 143 EUROPE: ETHYLENEAMINES MARKET, BY END USE, 2023–2028 (USD  
MILLION)

TABLE 144 EUROPE: ETHYLENEAMINES MARKET, BY END USE, 2021–2022  
(KILOTON)

TABLE 145 EUROPE: ETHYLENEAMINES MARKET, BY END USE, 2023–2028  
(KILOTON)

#### 10.2.2 GERMANY

##### 10.2.2.1 Technological advancements to boost market

TABLE 146 GERMANY: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD  
MILLION)

TABLE 147 GERMANY: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD  
MILLION)

TABLE 148 GERMANY: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022  
(KILOTON)

TABLE 149 GERMANY: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028

(KILOTON)

#### 10.2.3 UK

10.2.3.1 Growth of construction sector to boost demand for ethyleneamines

TABLE 150 UK: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 151 UK: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 152 UK: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 153 UK: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.2.4 FRANCE

10.2.4.1 Rising demand for resin and adhesives to drive market

TABLE 154 FRANCE: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 155 FRANCE: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 156 FRANCE: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 157 FRANCE: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.2.5 ITALY

10.2.5.1 New project finance rules and investment policies to fuel market

TABLE 158 ITALY: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 159 ITALY: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 160 ITALY: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 161 ITALY: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.2.6 RUSSIA

10.2.6.1 Presence of various end-use industries to fuel demand for ethyleneamines

TABLE 162 RUSSIA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 163 RUSSIA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 164 RUSSIA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 165 RUSSIA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.2.7 TURKEY

10.2.7.1 Rapid urbanization and rising middle-class population to drive market

TABLE 166 TURKEY: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 167 TURKEY: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 168 TURKEY: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022  
(KILOTON)

TABLE 169 TURKEY: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028  
(KILOTON)

#### 10.2.8 REST OF EUROPE

TABLE 170 REST OF EUROPE: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022  
(USD MILLION)

TABLE 171 REST OF EUROPE: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028  
(USD MILLION)

TABLE 172 REST OF EUROPE: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022  
(KILOTON)

TABLE 173 REST OF EUROPE: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028  
(KILOTON)

#### 10.3 ASIA PACIFIC

##### 10.3.1 RECESSION IMPACT ON ASIA PACIFIC

FIGURE 40 ASIA PACIFIC: ETHYLENEAMINES MARKET SNAPSHOT

TABLE 174 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY COUNTRY, 2021–2022  
(USD MILLION)

TABLE 175 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY COUNTRY, 2023–2028  
(USD MILLION)

TABLE 176 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY COUNTRY, 2021–2022  
(KILOTON)

TABLE 177 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY COUNTRY, 2023–2028  
(KILOTON)

TABLE 178 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022  
(USD MILLION)

TABLE 179 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028  
(USD MILLION)

TABLE 180 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022  
(KILOTON)

TABLE 181 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028  
(KILOTON)

TABLE 182 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY APPLICATION,  
2021–2022 (USD MILLION)

TABLE 183 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY APPLICATION,  
2023–2028 (USD MILLION)

TABLE 184 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY APPLICATION,  
2021–2022 (KILOTON)

TABLE 185 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY APPLICATION,

2023–2028 (KILOTON)

TABLE 186 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY END USE, 2021–2022 (USD MILLION)

TABLE 187 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY END USE, 2023–2028 (USD MILLION)

TABLE 188 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY END USE, 2021–2022 (KILOTON)

TABLE 189 ASIA PACIFIC: ETHYLENEAMINES MARKET, BY END USE, 2023–2028 (KILOTON)

#### 10.3.2 CHINA

10.3.2.1 Foreign investments to drive market

TABLE 190 CHINA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 191 CHINA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 192 CHINA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 193 CHINA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.3.3 INDIA

10.3.3.1 Boom in multifarious end-use industry to drive market

TABLE 194 INDIA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 195 INDIA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 196 INDIA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 197 INDIA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.3.4 JAPAN

10.3.4.1 Increase in chemical exports to drive market

TABLE 198 JAPAN: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 199 JAPAN: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 200 JAPAN: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 201 JAPAN: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.3.5 SOUTH KOREA

10.3.5.1 Rising demand for construction materials to drive market

TABLE 202 SOUTH KOREA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 203 SOUTH KOREA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 204 SOUTH KOREA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 205 SOUTH KOREA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.3.6 VIETNAM

10.3.6.1 Rising foreign investment in various manufacturing facilities to drive market

TABLE 206 VIETNAM: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 207 VIETNAM: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 208 VIETNAM: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 209 VIETNAM: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.3.7 REST OF ASIA PACIFIC

TABLE 210 REST OF ASIA PACIFIC: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 211 REST OF ASIA PACIFIC: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 212 REST OF ASIA PACIFIC: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 213 REST OF ASIA PACIFIC: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.4 NORTH AMERICA

##### 10.4.1 RECESSION IMPACT ON NORTH AMERICA

FIGURE 41 NORTH AMERICA: ETHYLENEAMINES MARKET SNAPSHOT

TABLE 214 NORTH AMERICA: ETHYLENEAMINES MARKET, BY COUNTRY, 2021–2022 (USD MILLION)

TABLE 215 NORTH AMERICA: ETHYLENEAMINES MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 216 NORTH AMERICA: ETHYLENEAMINES MARKET, BY COUNTRY, 2021–2022 (KILOTON)

TABLE 217 NORTH AMERICA: ETHYLENEAMINES MARKET, BY COUNTRY, 2023–2028 (KILOTON)

TABLE 218 NORTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 219 NORTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 220 NORTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022

(KILOTON)

TABLE 221 NORTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028

(KILOTON)

TABLE 222 NORTH AMERICA: ETHYLENEAMINES MARKET, BY APPLICATION,  
2021–2022 (USD MILLION)

TABLE 223 NORTH AMERICA: ETHYLENEAMINES MARKET, BY APPLICATION,  
2023–2028 (USD MILLION)

TABLE 224 NORTH AMERICA: ETHYLENEAMINES MARKET, BY APPLICATION,  
2021–2022 (KILOTON)

TABLE 225 NORTH AMERICA: ETHYLENEAMINES MARKET, BY APPLICATION,  
2023–2028 (KILOTON)

TABLE 226 NORTH AMERICA: ETHYLENEAMINES MARKET, BY END USE,  
2021–2022 (USD MILLION)

TABLE 227 NORTH AMERICA: ETHYLENEAMINES MARKET, BY END USE,  
2023–2028 (USD MILLION)

TABLE 228 NORTH AMERICA: ETHYLENEAMINES MARKET, BY END USE,  
2021–2022 (KILOTON)

TABLE 229 NORTH AMERICA: ETHYLENEAMINES MARKET, BY END USE,  
2023–2028 (KILOTON)

#### 10.4.2 US

10.4.2.1 Increased investment in chemical sector to boost market

TABLE 230 US: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 231 US: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 232 US: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 233 US: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.4.3 CANADA

10.4.3.1 Significant rise in ethyleneamine end use to propel market

TABLE 234 CANADA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD  
MILLION)

TABLE 235 CANADA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD  
MILLION)

TABLE 236 CANADA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022  
(KILOTON)

TABLE 237 CANADA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028  
(KILOTON)

#### 10.4.4 MEXICO

10.4.4.1 Increasing investment in manufacturing sector to drive market

TABLE 238 MEXICO: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD  
MILLION)



TABLE 239 MEXICO: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 240 MEXICO: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 241 MEXICO: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

## 10.5 MIDDLE EAST & AFRICA

### 10.5.1 RECESSION IMPACT ON MIDDLE EAST & AFRICA

FIGURE 42 SAUDI ARABIA TO RECORD HIGHEST CAGR BETWEEN 2023 AND 2028

TABLE 242 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY COUNTRY, 2021–2022 (USD MILLION)

TABLE 243 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 244 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY COUNTRY, 2021–2022 (KILOTON)

TABLE 245 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY COUNTRY, 2023–2028 (KILOTON)

TABLE 246 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 247 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 248 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 249 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

TABLE 250 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY APPLICATION, 2021–2022 (USD MILLION)

TABLE 251 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 252 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY APPLICATION, 2021–2022 (KILOTON)

TABLE 253 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 254 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY END USE, 2021–2022 (USD MILLION)

TABLE 255 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY END USE, 2023–2028 (USD MILLION)

TABLE 256 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY END USE,

2021–2022 (KILOTON)

TABLE 257 MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY END USE, 2023–2028 (KILOTON)

#### 10.5.2 SAUDI ARABIA

10.5.2.1 Increased government investment in chemical manufacturing and R&D to propel market

TABLE 258 SAUDI ARABIA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 259 SAUDI ARABIA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 260 SAUDI ARABIA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 261 SAUDI ARABIA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.5.3 UAE

10.5.3.1 Increase in industrial activities to drive market

TABLE 262 UAE: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 263 UAE: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 264 UAE: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 265 UAE: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.5.4 REST OF MIDDLE EAST & AFRICA

TABLE 266 REST OF MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 267 REST OF MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 268 REST OF MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 269 REST OF MIDDLE EAST & AFRICA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.6 SOUTH AMERICA

10.6.1 RECESSION IMPACT ON SOUTH AMERICA

FIGURE 43 BRAZIL TO RECORD HIGHEST CAGR BETWEEN 2023 AND 2028

TABLE 270 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY COUNTRY, 2021–2022 (USD MILLION)

TABLE 271 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 272 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY COUNTRY,

2021–2022 (KILOTON)

TABLE 273 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY COUNTRY,  
2023–2028 (KILOTON)

TABLE 274 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022  
(USD MILLION)

TABLE 275 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028  
(USD MILLION)

TABLE 276 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022  
(KILOTON)

TABLE 277 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028  
(KILOTON)

TABLE 278 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY APPLICATION,  
2021–2022 (USD MILLION)

TABLE 279 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY APPLICATION,  
2023–2028 (USD MILLION)

TABLE 280 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY APPLICATION,  
2021–2022 (KILOTON)

TABLE 281 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY APPLICATION,  
2023–2028 (KILOTON)

TABLE 282 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY END USE,  
2021–2022 (USD MILLION)

TABLE 283 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY END USE,  
2023–2028 (USD MILLION)

TABLE 284 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY END USE,  
2021–2022 (KILOTON)

TABLE 285 SOUTH AMERICA: ETHYLENEAMINES MARKET, BY END USE,  
2023–2028 (KILOTON)

#### 10.6.2 BRAZIL

10.6.2.1 Rising investments from government to drive market

TABLE 286 BRAZIL: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD  
MILLION)

TABLE 287 BRAZIL: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD  
MILLION)

TABLE 288 BRAZIL: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 289 BRAZIL: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.6.3 ARGENTINA

10.6.3.1 Population growth and improved economic conditions to drive market

TABLE 290 ARGENTINA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD  
MILLION)

TABLE 291 ARGENTINA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 292 ARGENTINA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 293 ARGENTINA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

#### 10.6.4 REST OF SOUTH AMERICA

TABLE 294 REST OF SOUTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (USD MILLION)

TABLE 295 REST OF SOUTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 296 REST OF SOUTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2021–2022 (KILOTON)

TABLE 297 REST OF SOUTH AMERICA: ETHYLENEAMINES MARKET, BY TYPE, 2023–2028 (KILOTON)

## 11 COMPETITIVE LANDSCAPE

### 11.1 OVERVIEW

#### 11.2 STRATEGIES ADOPTED BY KEY PLAYERS

TABLE 298 OVERVIEWS OF STRATEGIES ADOPTED BY KEY MARKET PLAYERS (2018–2023)

#### 11.3 MARKET SHARE ANALYSIS

FIGURE 44 MARKET SHARE ANALYSIS, 2022

TABLE 299 ETHYLENEAMINES MARKET: INTENSITY OF COMPETITIVE RIVALRY, 2022

#### 11.4 REVENUE ANALYSIS OF KEY COMPANIES

FIGURE 45 REVENUE ANALYSIS OF TOP FIVE PLAYERS, 2021–2022

#### 11.5 COMPANY EVALUATION MATRIX, 2022

##### 11.5.1 STARS

##### 11.5.2 EMERGING LEADERS

##### 11.5.3 PERVASIVE PLAYERS

##### 11.5.4 PARTICIPANTS

FIGURE 46 ETHYLENEAMINES MARKET: COMPANY EVALUATION MATRIX, 2022

##### 11.5.5 COMPANY FOOTPRINT

TABLE 300 COMPANY FOOTPRINT

#### 11.6 START-UPS/SMES EVALUATION MATRIX, 2022

##### 11.6.1 PROGRESSIVE COMPANIES

##### 11.6.2 RESPONSIVE COMPANIES

### 11.6.3 DYNAMIC COMPANIES

#### 11.6.4 STARTING BLOCKS

FIGURE 47 ETHYLENEAMINES MARKET: START-UP/SME EVALUATION MATRIX, 2022

#### 11.6.5 COMPETITIVE BENCHMARKING

TABLE 301 ETHYLENEAMINES MARKET: KEY START-UPS/SMES

TABLE 302 ETHYLENEAMINES MARKET: COMPETITIVE BENCHMARKING OF KEY START-UPS/SME

TABLE 303 COMPETITIVE BENCHMARKING: ETHYLENEAMINES MARKET

### 11.7 STRENGTH OF PRODUCT PORTFOLIO

FIGURE 48 PRODUCT PORTFOLIO ANALYSIS OF TOP PLAYERS IN ETHYLENEAMINES MARKET

### 11.8 MARKET RANKING ANALYSIS

FIGURE 49 MARKET RANKING ANALYSIS, 2022

### 11.9 COMPETITIVE SCENARIO

#### 11.9.1 MARKET EVALUATION FRAMEWORK

TABLE 304 STRATEGIC DEVELOPMENTS, BY COMPANY

TABLE 305 HIGHEST ADOPTED GROWTH STRATEGIES

TABLE 306 NUMBER OF GROWTH STRATEGIES ADOPTED BY KEY COMPANIES

#### 11.9.2 MARKET EVALUATION MATRIX

TABLE 307 COMPANY FOOTPRINT, BY TYPE

TABLE 308 COMPANY FOOTPRINT: BY REGION

TABLE 309 COMPANY FOOTPRINT

### 11.10 STRATEGIC DEVELOPMENTS (COMPETITIVE SITUATIONS AND TRENDS)

#### 11.10.1 ETHYLENEAMINES MARKET: DEALS, 2018–2023

TABLE 310 ETHYLENEAMINES MARKET: DEALS, 2018–2023

#### 11.10.2 ETHYLENEAMINES MARKET: PRODUCT LAUNCHES, 2018–2023

TABLE 311 ETHYLENEAMINES MARKET: PRODUCT LAUNCHES, 2018–2023

## 12 COMPANY PROFILES

(Business overview, Products/Solutions/Services offered, Recent Developments, MnM view, Key strengths, Strategic choices, Weaknesses and competitive threats) \*

### 12.1 KEY PLAYERS

#### 12.1.1 HUNTSMAN CORPORATION

TABLE 312 HUNTSMAN CORPORATION: COMPANY OVERVIEW

FIGURE 50 HUNTSMAN CORPORATION: COMPANY SNAPSHOT

#### 12.1.2 DOW INC

TABLE 313 DOW INC: COMPANY OVERVIEW

**FIGURE 51 DOW INC: COMPANY SNAPSHOT****12.1.3 TOSOH CORPORATION****TABLE 314 TOSOH CORPORATION: COMPANY OVERVIEW****FIGURE 52 TOSOH CORPORATION: COMPANY SNAPSHOT****12.1.4 NOURYON****TABLE 315 NOURYON: COMPANY OVERVIEW****TABLE 316 NOURYON: DEALS****12.1.5 BASF SE****TABLE 317 BASF SE: COMPANY OVERVIEW****FIGURE 53 BASF SE: COMPANY SNAPSHOT****TABLE 318 BASF SE: DEALS****12.1.6 DIAMINES AND CHEMICALS LTD.****TABLE 319 DIAMINES AND CHEMICALS LTD.: COMPANY OVERVIEW****FIGURE 54 DIAMINES AND CHEMICALS LTD.: COMPANY SNAPSHOT****12.1.7 SABIC****TABLE 320 SABIC: COMPANY OVERVIEW****FIGURE 55 SABIC: COMPANY SNAPSHOT****12.1.8 BALAJI SPECIALITY CHEMICALS LIMITED****TABLE 321 BALAJI SPECIALITY CHEMICALS LIMITED: COMPANY OVERVIEW****FIGURE 56 BALAJI SPECIALITY CHEMICALS LIMITED: COMPANY SNAPSHOT****12.1.9 ORIENTAL UNION CHEMICAL CORPORATION****TABLE 322 ORIENTAL UNION CHEMICAL CORPORATION: COMPANY OVERVIEW****FIGURE 57 ORIENTAL UNION CHEMICAL CORPORATION: COMPANY SNAPSHOT****TABLE 323 ORIENTAL UNION CHEMICAL CORPORATION: DEALS****12.1.10 KANTO CHEMICAL CO., INC.****TABLE 324 KANTO CHEMICAL CO., INC.: COMPANY OVERVIEW**

\*Details on Business overview, Products/Solutions/Services offered, Recent Developments, MnM view, Key strengths, Strategic choices, Weaknesses and competitive threats might not be captured in case of unlisted companies.

**12.2 OTHER PLAYERS****12.2.1 GFS CHEMICALS, INC.****TABLE 325 GFS CHEMICALS, INC.: COMPANY OVERVIEW****12.2.2 OAKWOOD PRODUCTS, INC.****TABLE 326 OAKWOOD PRODUCTS, INC.: COMPANY OVERVIEW****13 ADJACENT AND RELATED MARKETS****13.1 INTRODUCTION****13.2 MARKET DEFINITION**

### 13.3 MARKET ANALYSIS, BY TYPE

TABLE 327 FATTY AMINES MARKET, BY TYPE, 2017–2024 (USD MILLION)

TABLE 328 FATTY AMINES MARKET, BY TYPE, 2017–2024 (KILOTON)

### 13.4 MARKET ANALYSIS, BY END USE

TABLE 329 FATTY AMINES MARKET, BY END USE, 2017–2024 (USD MILLION)

TABLE 330 FATTY AMINES MARKET, BY END USE, 2017–2024 (KILOTON)

### 13.5 MARKET ANALYSIS, BY FUNCTION

TABLE 331 FATTY AMINES MARKET, BY FUNCTION, 2017–2024 (USD MILLION)

TABLE 332 FATTY AMINES MARKET, BY FUNCTION, 2017–2024 (KILOTON)

### 13.6 MARKET ANALYSIS, BY REGION

TABLE 333 FATTY AMINES MARKET, BY REGION, 2017–2024 (USD MILLION)

TABLE 334 FATTY AMINES MARKET, BY REGION, 2017–2024 (KILOTON)

## 14 APPENDIX

### 14.1 DISCUSSION GUIDE

### 14.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

### 14.3 CUSTOMIZATION OPTIONS

### 14.4 RELATED REPORTS

### 14.5 AUTHOR DETAILS



## About

The global market for ethyleneamines has witnessed high growth because of the awareness of consumers and end product manufacturers regarding the environmental benefits of, and government legislations and increasing demand for ethyleneamines. The global ethyleneamines market, which includes ethylenediamine, diethylenetriamine, triethylenetetramine and other higher ethyleneamines, has shown a high growth trajectory between 2010 and 2013. This market is projected to reach XX thousand tons by 2019, at a CAGR of XX% between 2012 and 2019. Asia-Pacific accounts for the major share of the overall ethyleneamines market due to increased development and consumer awareness, which are the growth drivers in this region. Penetration in the end-application industry, due to government policies, subsidies, and investments, are the key parameters used to determine the size of the products market.

The drivers of the industry are identified as growing usage of chemicals in end-user industries, to increase the quality of products and increased demand for durable end-application products. Some major drivers in this industry are increased demand in the Asia-Pacific region, government outlook towards green policies, and the shift in consumer preference toward quality products. The restraining factor is identified as cost-competitiveness and substitutes of ethyleneamines. The major restraints include the cost-competitiveness of conventional petrochemical-based ethyleneamines as compared to other higher ethyleneamines. Increased applications of ethyleneamines in other application sectors such as resin, paper, automotive, adhesives, and others, and the emerging markets, including Brazil, South East Asia, and Mexico, are expected to change market dynamics in the near future.

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