

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

<https://marketpublishers.com/r/E467838E415EN.html>

Date: October 2023

Pages: 284

Price: US\$ 4,950.00 (Single User License)

ID: E467838E415EN

## **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.

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\*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.

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## 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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