

Water Treatment Chemicals Market by Type (Flocculant & Coagulant, Corossion Inhibitors, Scale Inhibitors, Biocides & Disinfectants, Chelating Agents), Source, End-use (Residential. Commercial & Industrial), and Region - Global Forecast to 2028

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Abstracts

The global water treatment chemicals market size is estimated to be USD 36.7 billion in 2023 and projected to reach USD 43.9 billion by 2028, at a CAGR of 3.6%. The rising need for chemically treated water across diverse industries, strict regulations concerning water and wastewater, and escalating water pollution levels are driving factors in this market. Restraints, include the availability of alternative water treatment technologies, the high costs associated with water treatment chemicals, maintenance, and energy consumption. Opportunities stem from the increasing population and urbanization in emerging economies, as well as the growing demand for specialized treatment formulations.

“Asia Pacific is projected to grow the fastest in the water treatment chemicals market during the forecast period, in terms of value.”

Asia Pacific is projected to be the fastest growing market for water treatment chemicals in the forecast period, this growth is attributed to the region's surging industrialization and population expansion. The increased need for clean water, coupled with stringent environmental regulations, is driving the adoption of water treatment solutions at a brisk pace. These factors collectively contribute to the market's rapid expansion in the forecast period.

“Commercial segment accounted for the second largest market share amongst other end-use industries in the water treatment chemicals market.”

The commercial segment is the second-largest end-use industry in the water treatment chemicals market due to its diverse applications in sectors such as hospitality, healthcare, retail, and institutions. These businesses require water treatment chemicals to ensure safe and clean water for various purposes, including drinking, sanitation, and HVAC systems. As commercial activities grow, so does the demand for effective water treatment, cementing the segment's substantial market share.

“Cooling water treatment segment accounted for the second largest market share amongst other end-use industries in the water treatment chemicals market.”

Cooling water treatment is the second largest segment in the water treatment chemicals market because it plays a crucial role in maintaining the efficiency and longevity of industrial cooling systems, such as HVAC and manufacturing processes. These systems require chemical treatment to prevent scale formation, corrosion, and microbial growth. As industries expand, the need for cooling water treatment grows, ensuring optimal equipment performance and reducing operational costs, thus making it a significant component of the overall water treatment chemicals market.

“Biocide & Disinfectants segment accounted for the second largest market share amongst other types in the water treatment chemicals market”

Biocides & Disinfectants is the second largest type in the water treatment chemicals market due to their pivotal role in safeguarding water quality. With increased concerns about waterborne pathogens and microbial contamination in industrial, municipal, and commercial applications, the demand for these chemicals has surged. Biocides and disinfectants effectively eliminate bacteria, algae, and other harmful microorganisms, making them indispensable in ensuring clean, safe water for various end-users, solidifying their substantial market share in the water treatment chemicals industry.

Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 40%, Tier 2 – 30%, and Tier 3 – 30%

By Designation: C Level– 20%, D-level – 10%, And Other Level – 70%

By Region: North America – 20%, APAC – 30%, Europe – 30%, Middle East & Africa – 10%, South America-10%.

The water treatment chemicals market is dominated by a few globally established players such as Kemira OYJ (Finland), BASF SE (Germany), Ecolab Inc. (U.S.), Dow Inc. (U.S.), and Solenis LLC (US).

Research Coverage:

The water treatment chemicals market has been segmented based on type, application, end user, source, and region. The report also provides detailed information on company profiles and competitive strategies adopted by the key players to strengthen their positions in the market. The report also provides insights into the driving and restraining factors in the water treatment chemicals market, along with opportunities and challenges in the market. It also includes profiles for top manufacturers in the market.

Key Benefits of Buying the Report:

The report will help the leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the water treatment chemicals market and provides them with information on key market drivers, restraints, challenges, and opportunities.

Key benefits of buying this report

This research report is focused on various levels of analysis — industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view on the competitive landscape; emerging and high-growth segments of the water treatment chemicals market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of drivers (Increasing demand for chemically treated water in various end-use industries, stringent water and wastewater regulations, and increasing

water pollution), restraints (alternative water treatment technologies, high costs of water treatment, maintenance, and energy), opportunities (rising population and rapid urbanization in emerging economies, increasing demand for specific formulations, and rising scarcity of freshwater) and challenges (need for eco-friendly formulations and vulnerability regarding copying patents) influencing the growth of water treatment chemicals market.

Market Penetration: Comprehensive information on water treatment chemicals market offered by top players in the global market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and mergers & acquisitions in the water treatment chemicals market.

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for water treatment chemicals market across regions.

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the water treatment chemicals market.

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About

The report "Water Treatment Chemicals Market by Type (Coagulants & Flocculants, Corrosion Inhibitors, Scale Inhibitors, and Biocides & Disinfectants), End User (Municipal, Power, Oil & Gas, and Mining), Region - Global Forecast to 2022", The water treatment chemicals market is projected to grow from USD 42.23 Billion in 2017 to USD 56.57 Billion by 2022, at a CAGR of 6.0% from 2017 to 2022.

Major manufacturers profiled in this report include

BASF SE (Germany), Ecolab Inc. (US), Akzo Nobel N.V. (Netherlands), and Kemira OYJ (Finland). The report also includes the competitive strategies adopted by these key players to strengthen their position in the water treatment chemicals market.

The objective of this study is to define, describe, and forecast the water treatment chemicals market based on various segmentations and strategically analyze the market segments with respect to individual growth trends, growth prospects, and contribution to the total market. In this report, the water treatment chemicals market has been segmented based on type, end user, and region.

BASF SE (Germany), which is one of the leading manufacturers of water treatment chemicals, adopted the strategy of new product launches as its primary growth strategy. The company provides water treatment chemicals through its performance products business segment. BASF SE is strengthening its foothold in the water treatment chemicals market by launching new products in the market. For instance, in 2016, the company launched Sokalan AF-X at the Water, Energy, Technology, and Environment Exhibition (WETEX) - 2016 held in Dubai. Sokalan AF-X is a water-soluble and readily biodegradable antifoam used in the thermal desalination processes. The launch of this product helped the company enhance its position in the water treatment chemicals market. In 2014, BASF SE launched ultra-high molecular weight cationic powder flocculant with Zetag ULTRA for solid/liquid separation in industrial and municipal wastewater treatment plants. The launch of this product helped the company strengthen its position in water treatment chemicals market.

Ecolab Inc. (US) is also one of the major manufacturers of water treatment chemicals. The company has developed a strong client base by expanding its distribution networks to serve its customers efficiently and offer its customized products in the European, North American, and Asia-Pacific regions. The company provides water treatment

chemicals through its global industrial business segment, which accounted for a share of 36.0% of the total revenue of the company in 2016. It is focusing on strengthening its position in the market by adopting various inorganic growth strategies. In July 2016, the company acquired Aquatech International (US), which offers water purification technologies for the industrial and infrastructure sectors. The acquisition enabled Ecolab Inc. to strengthen its position in the water treatment chemicals market.

Based on type, the coagulants & flocculants segment is projected to lead the water treatment chemicals market in terms of volume during the forecast period

Based on type, the coagulants & flocculants segment is projected to lead the water treatment chemicals market in terms of volume during the forecast period. Coagulants & flocculants are widely used as water treatment chemicals in municipal and power applications. The increasing demand for coagulants & flocculants in these applications is due to the stringent implementation of various government regulations to ensure quality water for public health.

Based on end user, the municipal segment is projected to lead the water treatment chemicals market in terms of volume from 2017 to 2022

The municipal end user segment is projected to lead the water treatment chemicals market in terms of volume during the forecast period. As the global population is increasing continuously, the demand for treated quality water is also increasing. Thus, the consumption of water treatment chemicals in both, municipal and industrial sectors is increasing as there is a shortage of water resources. Municipalities treat water to meet stringent government regulations formulated to ensure public health. The water treatment chemicals in municipal water treatment plants are used for coagulation & flocculation, anti-foaming, chelation, and disinfection processes. Water treatment chemicals with a wide variety of properties are used at different stages and operating conditions in the municipal water treatment plants to remove impurities in water. Increased use of water treatment chemicals in the municipal water treatment plants is expected to drive the growth of the municipal end user segment of the water treatment chemicals market during the forecast period.

The North American region is projected to lead the water treatment chemicals market in terms of volume between 2017 and 2022

The North American region is projected to be the largest market for water treatment chemicals in terms of volume during the forecast period. The growth of the North

America water treatment chemicals market can be attributed to the large industrial base and high living standards of the population in the region that require high-quality water. In addition to this, the stringent implementation of various regulatory and sustainable mandates in the region concerning environment is also driving the growth of the North America water treatment chemicals market.

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