

# Sodium Fluorosilicate Global Market Insights 2026, Analysis and Forecast to 2031

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## Abstracts

### Sodium Fluorosilicate Market Summary

#### Introduction

Sodium Fluorosilicate ( $\text{Na}_2\text{SiF}_6$ ), also known as sodium hexafluorosilicate, represents a critical inorganic chemical compound derived primarily as a by-product of the wet-process phosphoric acid industry. It serves as a vital cost-effective source of fluorine for water fluoridation, a fundamental opacifying agent in the glass and enamel industries, and a key raw material in the production of other fluoride salts. The global market is intrinsically linked to the fertilizer industry, as the compound is produced by recovering silicon tetrafluoride gas from phosphate rock acidulation—a process that not only generates economic value but also mitigates environmental pollution by capturing hazardous emissions. As industries strive for circular economy models, the conversion of phosphate industry waste into commercial-grade Sodium Fluorosilicate has stabilized supply chains. The market is characterized by mature production technologies, with China playing a pivotal role as a global manufacturing hub due to its massive phosphate fertilizer industrial base.

#### Market Size and Growth Forecast

The global Sodium Fluorosilicate market is projected to reach a value of 550-620 million USD by 2026. The market is expected to witness steady expansion, with an estimated compound annual growth rate (CAGR) of 3.5%-4.5% through 2031. This growth is underpinned by consistent demand in water treatment infrastructure and the recovery of the construction sector driving demand for glass and enamel applications.

## Regional Analysis

**Asia Pacific:** This region dominates the global market and is expected to grow at a CAGR of 4.0%-5.2%. China stands as the undisputed leader in both production and consumption, driven by its vast phosphate rock reserves (ranking second globally) and massive fertilizer industry. The region's growth is fueled by infrastructure development in Southeast Asia and increasing water treatment mandates in developing economies.

**North America:** The market here is mature, with a projected CAGR of 2.5%-3.5%. Demand is primarily sustained by municipal water fluoridation programs, where Sodium Fluorosilicate is the preferred additive due to cost-efficiency. Regulatory stability and established industrial applications in glass manufacturing support steady, albeit slower, growth.

**Europe:** Experiencing a CAGR of 2.8%-3.8%, Europe's market is driven by high-end glass manufacturing and enamel production. Environmental regulations regarding fluoride emissions are strict, encouraging the use of high-purity grades for specialized applications.

**South America:** With a CAGR of 3.2%-4.2%, this region shows potential due to its growing agricultural sector (providing raw material potential via fertilizer production) and urbanization driving construction-related demand.

**Middle East & Africa:** This region is projected to grow at 3.5%-4.5%. As a global hub for phosphate rock extraction (particularly Morocco), there is significant untapped potential for downstream value addition to produce fluorosilicates locally rather than exporting raw phosphate rock.

## Application Analysis

**Water Fluoridation:** This application remains a foundational demand driver, particularly in North America and parts of Asia, where governments mandate fluoride levels in drinking water to prevent dental caries. The trend is towards high-purity, heavy-metal-free grades to meet stricter health safety standards.

**Glass and Enamel:** Used extensively as an opacifier and flux, demand in this sector tracks with the construction and household appliance industries. The shift towards aesthetic architectural glass and durable enamels for cookware maintains robust consumption.

**Construction Materials:** The compound is increasingly used in acid-resistant concrete and cements, serving as a setting agent that enhances durability in harsh industrial environments.

**Agrochemicals and Preservatives:** Its role as an insecticide and wood preservative supports demand in agriculture and forestry, particularly in regions battling specific timber pests.

### Industry Value Chain Analysis

The value chain begins with phosphate rock mining. During the production of wet-process phosphoric acid, fluoride gases (silicon tetrafluoride) are released. These are scrubbed and reacted with sodium salts (sodium chloride or sodium sulfate) to precipitate Sodium Fluorosilicate. This creates a dependency on the fertilizer industry's operating rates. The crude product undergoes filtration, washing, and drying to meet commercial specifications. High-end value is added through purification processes to reduce heavy metal content for water treatment and pharmaceutical grades. Distributors play a crucial role in connecting large-scale fertilizer-adjacent producers with fragmented end-users in municipal water boards and glass factories.

### Key Market Players

**Yuntianhua Co. Ltd.:** A giant in the Sodium Fluorosilicate industry, leveraging its massive phosphate resource integration.

**Sinochem Yunlong Co. Ltd.:** Maintains a significant annual production capacity of 10,000 tons, focusing on consistent quality for export and domestic use.

**Hubei Xiangyun (Group) Chemical Co. Ltd.:** A major player with a robust capacity, integrated deeply with its phosphate fertilizer operations.

**Hubei Yihua Group Co. Ltd.:** operates a capacity of 25,500 tons per year, serving diverse industrial sectors.

**Hubei Xingfa Chemicals Group Co. Ltd.:** A key specialty phosphate producer with a capacity of 15,000 tons per year, known for high environmental standards.

**Other Key Players:** K. C. Industries LLC (KCI), Derivados del Fluor S.A.U. (DDF), Do-

Fluoride New Materials Co. Ltd. (DFD).

### Market Opportunities and Challenges

**Opportunities:** The growing trend of 'urban mining' and circular economy principles presents a major opportunity. Technologies that improve the yield of fluorine recovery from fertilizer waste can lower costs and increase supply. Furthermore, the rising demand for high-strength, acid-resistant concrete in modern infrastructure projects creates a growing niche for Sodium Fluorosilicate as a hardening accelerator.

**Challenges:** The primary challenge lies in the supply-side dependency on the fertilizer industry; fluctuations in global fertilizer demand directly impact raw material availability. Additionally, strict environmental regulations regarding fluoride discharge and handling require continuous investment in safety and waste management systems, increasing operational costs for producers.

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