

Sodium Hexameta Phosphate (SHMP) Global Market Insights 2026, Analysis and Forecast to 2031

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Abstracts

Sodium Hexameta Phosphate (SHMP) Market Summary

Introduction

Sodium Hexameta Phosphate (SHMP) is a versatile mixture of polymeric metaphosphates, widely recognized for its sequestration, dispersion, and buffering capabilities. It serves as a critical ingredient across food processing, water treatment, and industrial cleaning sectors. In the food industry, it functions as a texturizer, emulsifier, and preservative, while in industrial applications, it is a potent water softener and scale inhibitor. The market is segmented by grade—Food and Technical—with strict purity requirements distinguishing the two. The supply chain is deeply rooted in the phosphate rock mining industry, linking global availability to the output of major phosphate-rich nations like Morocco and China.

Market Size and Growth Forecast

The global SHMP market is estimated to reach 0.85-1.05 billion USD by 2026, growing at a CAGR of 4.0%-5.0% through 2031. Growth is fueled by the rising consumption of processed foods requiring shelf-life extension and texture improvement, alongside increasing industrial water treatment activities to combat scaling in boilers and pipes.

Regional Analysis

Asia Pacific: The largest and fastest-growing region with a CAGR of 4.5%-5.5%. China and India drive demand through rapid urbanization (water treatment needs) and expanding food and beverage processing sectors. China's dominance in phosphate

rock processing provides a localized feedstock advantage.

North America: Projected CAGR of 3.0%-4.0%. The market is driven by the mature food processing industry (dairy, meat products) and advanced industrial water treatment technologies.

Europe: Anticipated growth of 2.8%-3.8%, with a strong focus on high-purity food-grade SHMP and eco-friendly detergent formulations.

South America: Estimated CAGR of 3.5%-4.5%, supported by the region's large meat processing industry where SHMP is used for moisture retention.

Middle East & Africa: Growing at 3.8%-4.8%, leveraged by local phosphate availability and increasing investments in desalination and water infrastructure.

Application Analysis

Food & Beverage: SHMP is widely used in dairy products, sausages, and seafood processing to retain moisture, prevent spoilage, and improve texture. The trend towards convenience foods supports this segment.

Water Treatment: It acts as a sequestering agent to prevent calcium and magnesium scale formation in boilers and cooling towers. As industries aim for higher water efficiency, demand for effective antiscalants rises.

Paper and Textile: Used as a dispersing agent in coating slips and dye baths to ensure product uniformity.

Ceramics: Acts as a deflocculant in ceramic slurry preparation, critical for the production of high-quality tiles and sanitary ware.

Industry Value Chain Analysis

The value chain originates with phosphate rock mining. High-quality rock is processed into thermal or wet-process phosphoric acid, which is then neutralized with soda ash to produce monosodium phosphate, followed by polymerization at high temperatures to yield SHMP. The quality of the phosphate rock (P₂O₅ content) significantly impacts production costs. Morocco holds the world's largest reserves (50 billion tons), while China (3.7 billion tons) is a major processor. The industry is capital intensive, requiring

energy-efficient furnaces for the polymerization phase.

Key Market Players

Shifang KonLon Chemical Co. Ltd.: A major industry participant with a substantial SHMP capacity of 50,000 tons per year, serving both domestic and international markets.

ICL (Israel Chemicals Ltd): A global powerhouse in phosphate specialties, offering high-purity food and technical grade SHMP.

Hubei Xingfa Chemicals Group Co. Ltd.: Leverages its integrated hydroelectric and phosphate resources to produce competitive phosphate salts.

Innophos: A key North American player focusing on specialty phosphate solutions for food and health.

Other Notable Players: Aditya Birla Chemicals, Prayon S.A., Sichuan Blue Sword Chemical, Chongqing Chuandong Chemical.

Market Opportunities and Challenges

Opportunities: The expansion of the organized retail food sector in developing economies offers significant headroom for food-grade SHMP. Additionally, the development of phosphate-based specialty glasses and advanced ceramics provides niche high-value opportunities.

Challenges: The primary challenge is the environmental scrutiny regarding phosphorus discharge, which contributes to eutrophication in water bodies. Stricter regulations on phosphate use in detergents in regions like the EU and USA limit growth in the cleaning sector, forcing producers to pivot towards industrial water treatment and food applications.

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