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Trichloroisocyanuric Acid Market Forecasts to 2030 – Global Analysis By Form (Powder, Granular and Tablet), Application (Disinfectant, Algaecide and Bactericide, Sericulture and Aquaculture and Other Applications), End User and By Geography

https://marketpublishers.com/r/TABB205C9E31EN.html
Date: February 2025
Pages: 150
Price: US$ 4,150.00 (Single User License)
ID: TABB205C9E31EN

Abstracts

According to Stratistics MRC, the Global Trichloroisocyanuric Acid Market is accounted for $2223.13 million in 2024 and is expected to reach $3411.85 million by 2030 growing at a CAGR of 7.4% during the forecast period. Trichloroisocyanuric acid (TCCA) is a common chlorine-based substance that is mostly used in water treatment applications as a sanitizing, disinfecting, and algaecide agent. It is frequently used in drinking water systems, spas, and swimming pools to manage bacteria, algae, and other dangerous microbes. The chemical is utilized in wastewater treatment, industrial cleaning, and the manufacture of bleaches and disinfectants. Because it releases chlorine gradually, TCCA is valued for its stability and efficacy in providing long-lasting sanitation.

According to a study published in the journal Environmental Science and Pollution Research, Trichloroisocyanuric acid (TCCA) is used extensively as a disinfectant, particularly in swimming pools, with approximately 60-80% of the global pool disinfectant market utilizing chlorine-based compounds like TCCA.

Market Dynamics:

Driver:

Increasing water treatment demand

Due to urbanization, industrialization, and the growing global population, there is a

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growing need for safe and clean drinking water. TCCA is essential to water purification procedures, especially in swimming pools, spas, and municipal water systems. It successfully fights off microbial contamination from viruses, bacteria, and algae. Governments and local authorities are putting more emphasis on effective water treatment solutions in an effort to improve public health and lower the risk of waterborne diseases. Moreover, effective disinfectants like TCCA are advised for use in water treatment by the World Health Organization (WHO) and other health organizations, which encourage their use globally.

Restraint:

Health risks and management concerns

Trichloroisocyanuric acid is classified as a hazardous substance, requiring careful handling during transport, storage, and use. Improper handling or unintentional exposure can pose serious health risks because it is corrosive to the skin, eyes, and mucous membranes. Burns and irritation can result from extended skin contact with TCCA, while respiratory problems can arise from inhaling its dust or vapor. Its application requires the use of protective gear, including respirators, goggles, and gloves, due to these health risks. Additionally, this makes its use more complicated and expensive, especially in industrial settings where TCCA is needed in large quantities.

Opportunity:

Growing TCCA adoption in emerging markets

The need for safe and clean drinking water as well as efficient sanitation systems is growing as developing economies continue to expand and become more urbanized. Because of insufficient infrastructure for water treatment, waterborne illnesses are still common in many emerging markets. Water treatment facilities are being invested in by governments and organizations, and TCCA is a promising option for large-scale applications due to its affordability and efficacy. Furthermore, the need for swimming pools and recreational water facilities will increase as the middle class expands and health and wellness become more important, which will increase demand for disinfectants based on TCCA.

Threat:

Growing competition from other disinfectants

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The growing competition from alternative disinfectants is one of the biggest risks facing the TCCA market. Many alternatives that are marketed as less hazardous and more ecologically conscious have surfaced in response to the growing demand for safer, greener solutions. Calcium hypochlorite and sodium dichloroisocyanurate (SDIC), for instance, have disinfecting qualities comparable to TCCA but frequently pose fewer risks to human health and the environment. Because bromine-based disinfectants are less volatile and cause less skin irritation than chlorine-based ones, they are gaining popularity in pool and spa applications. Moreover, water treatment and sanitation procedures are increasingly utilizing newer technologies like electrochemical disinfection, ozone treatment, and ultraviolet (UV) light disinfection.

Covid-19 Impact:

The COVID-19 pandemic had a major effect on the market for trichloroisocyanuric acid (TCCA), mostly because of changes in demand, labor shortages, and disruptions in global supply chains. On the one hand, the pandemic's increased focus on cleanliness and hygiene raised demand for disinfectants like TCCA, particularly for public sanitation, pool upkeep, and water treatment. However, the pandemic also brought about logistical problems, like delays in the transportation and acquisition of raw materials, which led to supply shortages and price volatility. Production was further impacted by manufacturing facilities' capacity limitations or temporary closures as a result of health and safety regulations.

The Granular segment is expected to be the largest during the forecast period

The Granular segment is expected to account for the largest market share during the forecast period. Granular TCCA is frequently used in water treatment applications because of its high stability, ease of handling, and disinfecting efficacy, especially for swimming pools and municipal water sanitation. Because of its granular form, which permits controlled dissolution, it can be used in both small-scale consumer applications and large-scale industrial settings. Moreover, the segment's growth is driven by its convenience, precise dosage, and widespread adoption in both commercial and residential settings.

The Sericulture and Aquaculture segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Sericulture and Aquaculture segment is predicted to

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witness the highest growth rate because of its potent disinfecting and algaecidal qualities, which are essential for preserving wholesome farming conditions, TCCA is being utilized more and more in aquaculture and sericulture. To maintain the health and development of aquatic species, TCCA is used in aquaculture to manage bacteria, algae, and pathogens in fish and shrimp farming. Similarly, it promotes greater yields and higher-quality silk production in sericulture by preventing microbial infections in silkworms. Additionally, rapid market growth in this segment is being driven by the increasing adoption of TCCA as an affordable disease control solution and the growing demand for efficient and sustainable practices in these industries.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share, driven by the strong demand for sanitation and water treatment products in countries in Southeast Asia, China, and India, which are all experiencing rapid economic growth. The demand for TCCA is greatly influenced by the region's robust industrial base as well as the growing swimming pool, aquaculture, and sericulture industries. Furthermore, the use of TCCA to disinfect and control bacteria and algae in water systems has increased due to the growing emphasis on enhancing public health and sanitation, especially in emerging markets.

Region with highest CAGR:

Over the forecast period, the Middle East and Africa region is anticipated to exhibit the highest CAGR. The rising demand for water treatment and disinfection products in both the residential and commercial sectors, along with the growing popularity of aquaculture along the coast, is the main drivers of the growth. Moreover, the demand for TCCA in water sanitization procedures is rising due to rapid urbanization and industrialization, especially in nations like Saudi Arabia, the United Arab Emirates, and Egypt. Additionally, the consumption of TCCA in the Middle East and Africa will rise significantly in the upcoming years due to increased awareness of the advantages of efficient water treatment and improved infrastructure.

Key players in the market

Some of the key players in Trichloroisocyanuric Acid market include FMC Corporation, Nankai Chemical Co.,Ltd., Covestro AG, Occidental Petroleum Corporation, Monsanto Company, Sinopec Corporation, Nissan Chemical Corporation, Bodal Chemicals Ltd., Ercros S.A., Nippon Soda Co., Ltd, Sigma-Aldrich, Inc. (Merck), Asahi Kasei

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Corporation, Heze Huayi Chemical Co., Ltd., Shikoku Chemicals Corporation and Inner Mongolia Lantai Industrial Co., Ltd.

Key Developments:

In December 2024, Nissan Motor Co., Ltd. and Honda Motor Co., Ltd. have signed a memorandum of understanding (MOU) to start discussions and considerations toward business integration between the two companies through the establishment of a joint holding company.

In October 2024, Covestro AG has signed an investment agreement with the Abu Dhabi National Oil Co. (ADNOC) Group (United Arab Emirates), including ADNOC International Ltd. and its subsidiary, ADNOC International Germany Holding AG. When this transaction is finalized, two Middle Eastern companies — SABIC and ADNOC — will control a big chunk of engineering thermoplastic resins.

In September 2024, FMC Corporation announced an agreement with Ballagro Agro Tecnologia Ltda., a pioneer and leader in fungi-based biosolutions, to provide growers in Brazil with a broad portfolio of differentiated biological solutions. The agreement is part of FMC's strategic plan to grow its biologicals platform in key markets like Brazil.

Forms Covered:

- Powder
- Granular
- Tablet

Applications Covered:

- Disinfectant
- Algaecide and Bactericide
- Sericulture and Aquaculture
- Other Applications

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End Users Covered:

- Water & Wastewater Treatment
- Sports & Recreation
- Textile and Dye Industry
- Agriculture
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe

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  - Rest of Asia Pacific
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  - Qatar
  - South Africa
  - Rest of Middle East & Africa

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What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

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Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

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Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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